

| | Out | In | Out | Rate1 | Rate2 | Rate3 |
|--|-------|-------|-------|--------|--------|--------|
| | | | | x01.00 | x01.25 | x02.00 |
| | 12:03 | 12:59 | 18:50 | 08:00 | 02:00 | |
| | 12:00 | 12:59 | 18:40 | 08:00 | 01:30 | |
| | | 13:02 | 17:00 | 08:00 | | |
| | | 12:58 | 18:47 | 08:00 | 01:30 | |
| | | 12:58 | 15:55 | 07:00 | 00:30 | |
| | | | | | | 01:45 |
| | | | | 39:00 | 05:30 | 01:45 |
| | | | | 39:00 | 05:30 | 01:45 |
| | | | | 39:00 | 6.88 | 3.50 |

FOCUS PRO USER GUIDE

Version 2.567

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FOCUS

Installation and User Guide

by HR Industries Ltd.

This manual provides a guide to the set up and day to day use of the HRX3000 and HRX5000 clocking terminals and Focus Software.

Also covers the use of biometric Hand Geometry readers.

Focus User Guide

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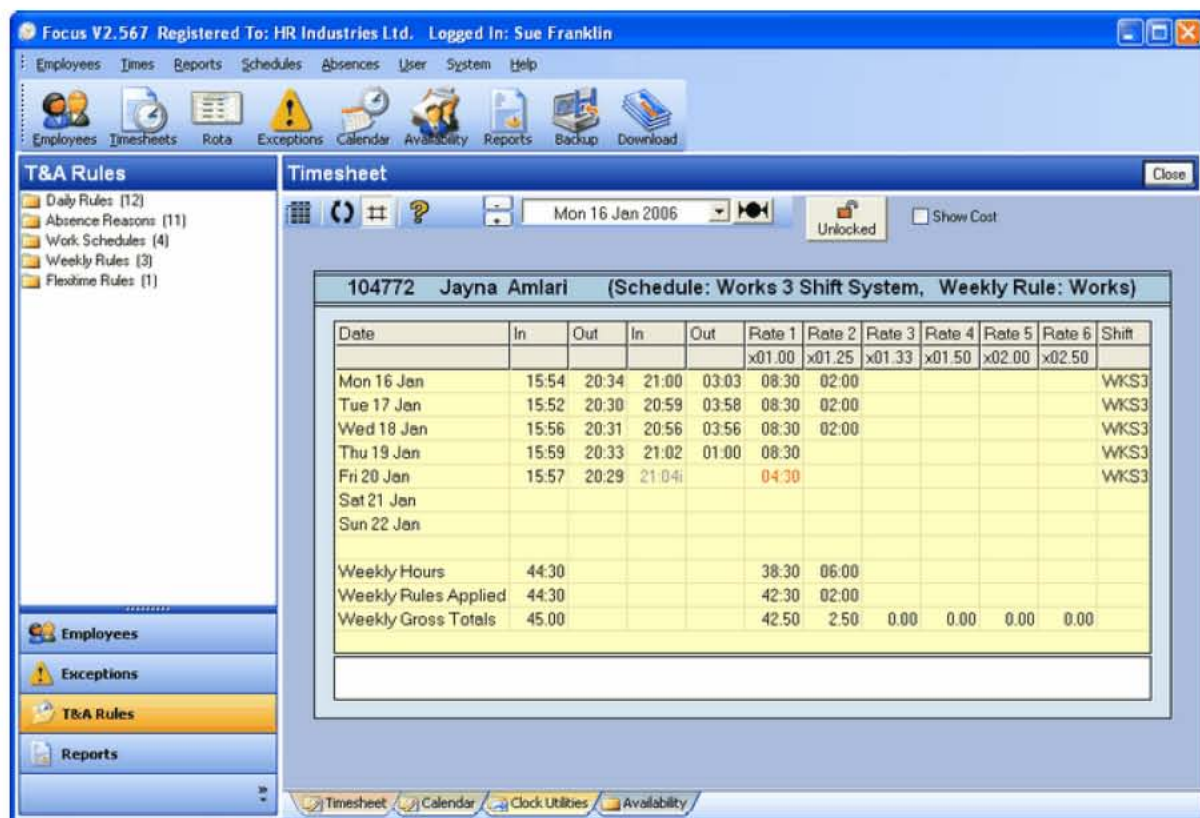
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1 User Interface

The software has the familiar Outlook look and feel, with shortcut buttons, traditional drop down menu and treeview to navigate with a large multi-tabbed work area.



You can increase your work area by temporarily removing some of the menus and navigation buttons by using certain Function Keys on your keyboard:

F6 - Hide the left hand Treeview. The width of the left hand navigation pane can also be reduced by clicking on the divider with the left mouse button and dragging it to the required position.

F7 - Hide the Large Icon Buttons;

F8 - Hide the Drop Down Menu;

F9 and F11 - Toggle Full Screen mode On and Off

2 Terminals

The FOCUS software uses any of the terminals shown below to collect Employee clockings. As well as clocking at a terminal, employees can also clock at their PCs and check holiday bookings from their PCs or over the Internet.

Proximity terminals use smart cards or keyfobs to clock IN. This is probably the fastest method for users to register their clockings, meaning no queues at the clock. Users just hold their tokens near the reader, the reader beeps and the user's name is shown on the screen along with their current IN/OUT status. No contact means no wear and tear. Badges can be printed for ID and terminals can control access to premises. Direct link to Fire Alarm and Printer for rollcall. Sealed IP65 versions available.



Model types cover HRX5000, HRX3000, HRX1000

Connect by TCP/IP, RS-232 Serial, USB, internal GSM or PSTN modem.

The Biometric Hand Scanner uses 3D hand geometry and PIN number to combat 'buddy punching' in unsupervised situations. This is a mature technology resistant to contamination of hand from environment.

Connect by TCP/IP, RS-232 serial, USB or external modem.



Biometric Fingerprint Reader. The latest technology can identify hundreds of fingerprints in seconds. Just place the finger to clock IN or OUT. For extra security add a PIN number or proximity card. The fingerprint is not saved, just a unique numeric representation. Option to store the fingerprint templates on Smart Cards.

Connect by TCP/IP, RS-232 serial, USB, USB Memory Stick or external modem.



3 Employees



Shortcut Button



Starts the creation of a New Employee record with personal details left blank and certain Default

Fields initialised. Default fields include such as Holiday Allowance, Holiday Start Date, Group membership. Whenever you are displaying details for an employee, you can save the default fields to be used as a template for New Employees by clicking on the **Save AS DEFAULT** button.



Starts a New Employee by 'Cloning' or Duplicating the currently viewed Employee. This is useful when you are setting up new Employees who share similar settings such as group membership or working patterns.



Saves the current employee's details to the database. You will not be allowed to move away from the current employee if it is being edited without saving or cancelling the edit.



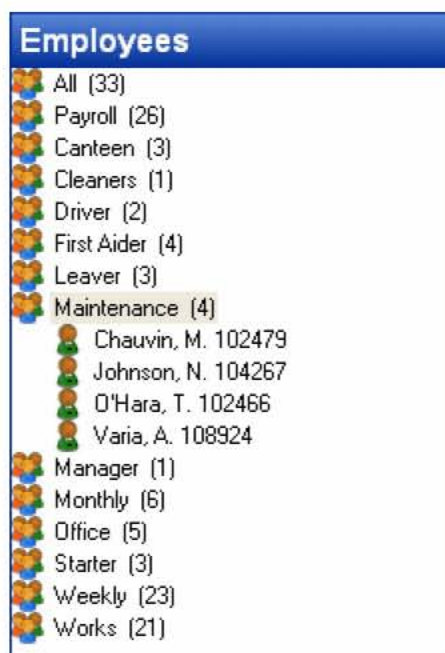
Cancels editing of the current employee.



Creates a Detailed Report of the current employee.

Employees are arranged in Groups which you can set up to be any classification or collection that you like. The Group names are defined in [System Setup](#).

When you need to navigate to an employee's details or time sheet, you do so via the Employee Tree view. For example:



In this Company there are 33 employees (All). There are 26 on the Payroll, 3 work in the Canteen, 1 is a Cleaner etc. The Maintenance Group has been 'opened' by clicking on the word 'Maintenance' to expose the names of the 4 employees allocated to that Group. Clicking on the Employee Name will cause the screen to show the details for that employee. Clicking on 'Maintenance' again will close the Maintenance Group.

By the nature of the Grouping system, each employee can appear in more than one Group. Therefore the number of employees on the system (33) will not be equal to the sum of the employees in all the

Groups.

Right Click on the employee in the tree view to navigate to the Employees Details, Time sheet, or work rules.

3.1 Contact Tab

Employee menu - Contact Tab

The **Contact** Tab on the Employee form shows you, and allows you to edit, the Employee address and contact telephone number details.

The screenshot shows the 'Contact' tab of an employee form for Michael Chauvin. The form is titled 'Michael Chauvin' at the top. It contains several input fields for personal and contact information. At the bottom, there is a tabbed interface with 'Contact' selected, and other tabs include 'Groups', 'Rules', 'Holidays', 'Dates', 'Clock', 'Memos', and 'User'.

| Michael Chauvin | | | |
|-----------------|--------------------|-------------|--|
| Title | First Name | Last Name | PIN |
| Mr. | Michael | Chauvin | 20005173 |
| | Payroll Number | Job Title | Password |
| | 102479 | Electrician | xxxx |
| | | | <input checked="" type="checkbox"/> View Timesheet |
| | | | <input checked="" type="checkbox"/> View Calendar |
| Address | | | |
| Address1 | 23 Lexington Grove | | |
| Address2 | Bulcote | | |
| Address3 | | | |
| City | Doncaster | | |
| County | South Yorkshire | | |
| Postcode | S10 9BN | | |
| Phone | | | |
| Home | 0145 889 2354 | | |
| Mobile | | | |
| Work | | | |
| Personal | | | |
| NI Number | | | |

Contact Groups Rules Holidays Dates Clock Memos User

Note that the User Tab on the right hand side of the form at the bottom only appears if you have defined any User Fields in the System Setup section.

PIN: This field and the three following are only visible if you have purchased the PC Clocking Option. This allows Employees to clock IN and OUT at their PCs as well as or instead of at the clocking terminals. An Employee is given access to the feature by assigning him/her a PIN number and a Password. They can then clock IN/OUT from the Times | Punch menu on the main FOCUS software (if they have access to the full software) or they can use the separate clocking utility which gives them access only to Clock IN/OUT and view their time sheet and calendar.

The PIN number field is also used to identify the Employee if a Hand Reader is used rather than an HRX3000 or HRX5000 to collect clockings.

Password: Required to access PC Clocking. May be changed by the individual Employee to whom it belongs.

View Time sheet: Tick this box to allow the Employee to view his/her time sheet when logged in for PC Clocking.

View Calendar: Tick this box to allow the Employee to view his/her calendar when logged in for PC Clocking.

3.2 Groups Tab

Employee menu - Groups Tab

Each employee can belong to up to 5 **Groups**. Groups can be any type of classification to suit your operation. They could be, for instance, names of Departments, types of Skill, Pay Type, Work Pattern or any other type of classification. The Group List is then offered as a filter when you come to process employees, such as producing reports or setting absences.

Any number of Groups may be defined in the [System - Setup Menu](#)

The screenshot shows the 'Groups Tab' for the employee Virginia Ackerman. The form has a header bar with the employee's name 'Virginia Ackerman'. Below this, there are input fields for 'Title' (Mrs.), 'First Name' (Virginia), 'Last Name' (Ackerman), 'PIN' (empty), 'Payroll Number' (107345), and 'Job Title' (Administrator). A section titled 'Include In Groups:' contains a list of groups with checkboxes. The groups and their selection status are: Payroll (checked), Canteen (unchecked), Cleaners (unchecked), Driver (unchecked), First Aider (unchecked), Leaver (unchecked), Maintenance (unchecked), Manager (unchecked), Monthly (checked), Office Fixed Hours (checked), Office Flextime (unchecked), Starter (unchecked), Weekly (unchecked), and Works (unchecked). Below the list is a 'Fire Muster Group' field with the value '02'. At the bottom of the form is a navigation bar with tabs: 'Contact', 'Groups' (highlighted), 'Rules', 'Holidays', 'Dates', 'Memos', and 'User'.

Fire Muster Group: The software is capable of generating a report of Employees present in the event



of a Fire Alarm activation by clicking on the **Fire Report** button. One of the format options of this report is to group Employees by Fire Group, which is set up on the Employee Screen, Groups tab. See also [Printers](#) on the System Setup menu.

3.3 Rules Tab

Employee menu - Rules Tab

Use the Employee Rules tab to tell the system which Time and Attendance Rules to apply to their clocking times. Each employee has rules which define what times they work on a daily basis (either a [Work Schedule](#) or a [Rota](#)) and what rules to apply at the end of each week (the [Weekly Rules](#)). These rules are defined in the **Schedules** menu.

Each employee also has a set of Rate Factors for the 6 rates of pay that the system supports. You can define these in multiples of hours (e.g. time, time and a third, time and a half, double time) or you can enter an actual monetary value. The time sheet multiplies the hours worked by the rate factor for each Rate of Pay, giving a result in hours or as Gross Pay, depending on the scheme you chose.

Michael Chauvin

Title: Mr. First Name: Michael Last Name: Chauvin PIN: 20005173
 Payroll Number: 102479 Job Title: Electrician Password:
☐ View Timesheet ☐ View Calendar

Work Schedule
 Uses Rota
 Employee is Allocated Shifts from Rota

Weekly Rule
 Works
 Minimum 42:30 per week before overtime paid

Clockings
 Maximum Shift Hours:
 Maximum Break Hours:

Flexitime Rule
 None
 Starting Balance:

Default Daily Rule
 Default Daily Rule

Rate Factors
 Gross Hourly Pay: 06.00
 Rate 1: 01.00 Rate 2: 01.25 Rate 3: 01.33 Rate 4: 01.50 Rate 5: 02.00 Rate 6: 02.50
 Ref 1: Ref 2: Ref 3: Ref 4: Ref 5: Ref 6:

Contact Groups **Rules** Holidays Dates Clock Memos User

Selection of the Weekly Rules and Work Schedule is from the drop down list. The memo fields are set by the Schedule definition and cannot be changed here. If you want the employee's work pattern to be

defined by a flexible Rota, rather than a fixed, repeating, Work Schedule, select 'Uses Rota' from the Work Schedule drop down list.

The 'Gross Hourly Pay' amount shows the hourly pay and can be used to indicate calculated weekly costs for a Group of employees. You can specify whether monetary pay amounts are visible at a System User level in **System menu - Setup Users**.

Ref 1-6: The figures in the 6 boxes marked Ref 1 to Ref 6 in the 'Rate Factors' area are the Pay References that can be sent through to various Payroll Packages, notably Sage Payroll Professional. This feature allows you to assign a Pay Reference to each of the 6 Rates of pay for each Employee. The export for the Employee above would look like:



The Employee Payroll Number is 102479. He is paid for 14.75 hours for time at Rate 1 which is Pay reference 2045, 8.25 hours at Rate 2 which is Pay Reference 2046 etc.

Default Daily Rule: Generally, you set the system up so that it knows which Daily Rule to apply to a set of employee's clockings by programming the Rota or Work Schedule with appropriate rules. If the software is unable to select a rule, it will apply the system Default Daily Rule which will have rules for rounding times etc. In the employee details screen here it is possible to override the System Default Daily Rule and set up a different Default Daily Rule for each employee. This can be of particular relevance when programming the Rota.

Maximum Shift Hours: FOCUS uses this parameter to help split groups of clockings into shifts. There is a default setting in the [Connections screen](#) but this can be overridden for individual employees, if necessary, to fine tune their shift calculations.

Maximum Break Hours: This is the number of hours FOCUS will allow for a break in working hours before it starts a new shift.

Consider the following clocking pattern:

IN 09:00 OUT 12:30

IN 15:00 OUT 19:00

If Max Break is set to 4 or more, the system will interpret the clockings as a single shift with a 2:30 break in the middle of the day. If Max Break is set to 3 or less, the clockings will produce a split shift and apply 2 sets of Daily Rules.

There is a default system setting for this parameter in [System Setup | General](#) tab but it can be overridden for individual employees, if necessary, to fine tune their shift calculations.

3.4 Holidays Tab

Employee menu - Holidays Tab

Employees' Holidays within FOCUS can be handled in two ways:


1. **Fixed:** The Employee is allocated a fixed number of days per year, which may be varied year on year;
2. **Earned:** Holidays are accrued (or earned) based on the number of days an employee has worked within the holiday year.

Each employee has the following parameters which determine how the system handles their personal holidays.

Holiday Year Starts: Each employee may have an individual date for the start of their holiday year. But beware that if you use different Holiday Start Dates it will be difficult to compare holidays left across a group of employees within a single date range. See Holiday Reports for a fuller explanation.

Holiday in Hours/Days: The system supports holiday booking and tracking in days or hours on an individual employee basis.

The screenshot displays the 'Virginia Ackerman' employee profile with the 'Holidays' tab selected. The form includes fields for personal details: Title (Mrs.), First Name (Virginia), Last Name (Ackerman), PIN (10000001), Payroll Number (107345), and Job Title (Administrator). There are checkboxes for 'View Timesheet' and 'View Calendar'. The 'Holiday Entitlement' section features a 'Holiday Year Starts' dropdown set to '01/01/2006' and radio buttons for 'Days' (selected), 'Hours', 'Fixed', and 'Earned'. The 'Fixed Entitlement' section shows 'Default Yearly Allowance' as 20.0 Days and 'Default Yearly Adjustment' as 03.0 Days. A 'Holiday...' button is located to the right of the entitlement sections. At the bottom, a navigation bar contains tabs for 'Contact', 'Groups', 'Rules', 'Holidays' (highlighted), 'Dates', 'Clock', 'Memos', and 'User'.

Clicking on the  button shows a detailed breakdown of the employee's holiday history:

| Year | Start | End | Allowance | BroughtFwd | Adjust | TotalAllow | Taken | Booked | EndBalance | MaxCarry | CarryFwd |
|------|------------|------------|-----------|------------|--------|------------|-------|--------|------------|----------|----------|
| 2004 | 01/01/2004 | 31/12/2004 | 20 | | | 20 | | | 20 | 2 | 2 |
| 2005 | 01/01/2005 | 31/12/2005 | 20 | 2 | | 22 | 11 | | 11 | 2 | 2 |
| 2006 | 01/01/2006 | 31/12/2006 | 20 | 2 | 3 | 25 | 19 | | 6 | 2 | 2 |
| 2007 | 01/01/2007 | 31/12/2007 | 20 | 2 | -1 | 21 | 18 | | 3 | 2 | 2 |
| 2008 | 01/01/2008 | 31/12/2008 | 20 | 2 | | 22 | | | 22 | 2 | 2 |

The grey cells are calculated values. The white cells may be individually edited by double clicking in them. The editable cells may also be set up as a bulk operation within **System | System setup | Holiday Tab**

The 'Adjust' column allows the user to add e.g. Days in Lieu on an ad hoc basis. This figure can also be made negative. The Max Carry column limits the number of holidays transferred from the End Balance column of one period to the Carry Forward column on the next period.

By editing the Start and End dates, the period covered does not necessarily have to be a full year.

When using the Fixed Holiday method, the Allowance column for each year may be edited (as well as the Adjust).

The **Earned Holiday** method will be used for Temporary or Casual workers where the amount of holiday given is linked to the number of days the employee has worked for the Company. The holidays earned are defined as a proportion (usually around a tenth) of the days (or hours) worked. In this case we need to define what we mean by 'Days Worked' - how long constitutes a day, and whether or not absences contribute to worked days.

Holiday/Worked Day: This is the 'Accrual Factor', or the number of holidays earned for each day worked. In the example above the employee earns 1 day holiday for each 10 days worked.

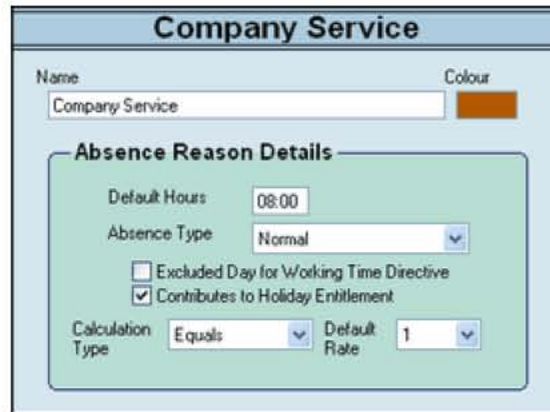
Max Days: Limits the number of holidays earned to a maximum.

Half and Full Threshold: These parameters define what constitutes a 'half day' worked and a 'full day worked'. In the example, if an employee works less than 3.5 hours in a day, they will earn no holiday entitlement. Between 3.5 and 7 hours will allow them 0.5 of 0.1 days holiday, and over 7 hours worked will give them the full 0.1 day holiday entitlement.

Earned holiday can be set individually to work in Hours as well as Days. When working in Hours or Earned Holiday, the system uses a simple count of time worked (using the rounded figures) which is

multiplied by the Accrual factor to calculate the hours holiday entitlement.

If any employees are using Earned Holidays, the Absence Definition form has an extra parameter - 'Contributes to Holiday Entitlement'



The screenshot shows a software window titled "Company Service". Inside, there is a "Name" field containing "Company Service" and a "Colour" field with a brown square. Below this is a section titled "Absence Reason Details" with a light green background. Within this section, there are several fields: "Default Hours" set to "08:00", "Absence Type" set to "Normal" (with a dropdown arrow), a checkbox for "Excluded Day for Working Time Directive" which is unchecked, and a checkbox for "Contributes to Holiday Entitlement" which is checked. At the bottom of the section, there is a "Calculation Type" dropdown set to "Equals" and a "Default Rate" dropdown set to "1".

The '**Contributes to Holiday Entitlement**' tick box determines whether this type of absence counts as worked time for the calculation.

Note: Absences booked for the future do not count towards Earned holidays. So if an employee has a week's Company Service to be taken in 3 months time, he/she will not benefit from the Earned Holiday entitlement until the Company Service has been taken.

See also [Holiday Report](#).

3.5 Dates Tab

Employee menu - Dates Tab

Use the Dates Tab on the Employees form to set up key dates.

Michael Chauvin

| | | | | |
|-------|----------------|-------------|----------|--|
| Title | First Name | Last Name | PIN | <input checked="" type="checkbox"/> View Timesheet |
| Mr. | Michael | Chauvin | 365 | |
| | Payroll Number | Job Title | Password | <input checked="" type="checkbox"/> View Calendar |
| | 102479 | Electrician | | |

Dates

| | |
|---------------|--------------|
| Start Date | X 06/12/1999 |
| Leaving Date | X |
| Date of Birth | X |

Contact Groups Rules Holidays **Dates** Clock Memos User

The Start Date and Leaving Date are used by the system to qualify clockings to determine if an employee is absent from work (See [Exceptions](#))

3.6 Clock Tab

Employee menu - Clock Tab

The Employee Clock Tab controls the interface between the PC database and the clocking terminal.

Employees are provided with their own unique clocking token (various styles of credit card style badges of key fobs) and this token is registered on the clock as belonging to that employee. Registering the employee on the clock allows the clock to display the employees' details when they clock and include them in the Fire Alarm muster report. Tokens can be used for visitors or temporary staff by pre-registering them as, say, Visitor1 to Visitor10.

PCs may or may not have access to the clock depending on the method you are using to connect to the clock (TCP/IP, RS-232 or modem).

3.6.1 Registering a New Employee on the Clock

Employee Menu - Clock Tab

For HRX proximity terminals, the Employee data held on the clock is:


Badge Number- the number printed on the employee's clock badge/token


Display Line 1 & 2 - text to be shown when the employee clocks IN or OUT

Fire Muster Group - controls the grouping on the Fire Alarm Printout

Access Group - determines which set of Physical Access Control rules to apply to the employee.

To create new data for the clock or to modify existing data you must fill in the new data in the boxes in

the 'Data to Send to the Clock' frame and  Save it. This Saves the data in the PC Database. You

must then click on  to register the employee details on the clock. At this point the data in the bottom frame will transfer to the top frame and the clock will respond with the new number of employees that are registered.

Employees may be registered on more than one clock (terminal). This will depend on the terminal type and its physical location. e.g. You could have HRX terminals in the local building as well as a totally different site. Certain employees who move between sites will be registered on both terminals so that they may appear on the fire report when they are present at the relevant site.

When you initially add a New Employee to the PC database both the 'Data Held on the Clock' and 'Data to Send to the Clock' frames hold blank data. Enter in the number of the Badge you want to assign to

the New Employee in the Badge Number field in the 'Data to Send to the Clock' frame. You can do this even if you are not working at a PC that is not connected to the clock, but you will not be able to complete the registration from this PC. The Badge Number is the unique 8 digit number printed on the credit card type badge or the key fob.

The clock has a display with 2 lines each of 16 characters. When an employee clocks IN or OUT, the clock beeps and the display changes from showing the time and date to showing the data you enter on this form. 12 characters can be shown on the top line of the display, 16 characters on the bottom line. This would normally be set up for the Employees' Name and/or Payroll Number. This text is entirely 'free form' - you can get the clock to display whatever you want.

3.6.2 Changing an Employee's Badge

Employee Menu - Clock Tab

If you want to change an Employee's badge or fob number, for example because the old one has been lost, you use the Clock tab on the Employee form. This also applies to any of the other changeable parameters such as the display text, Fire Group or Access Group.

It is important that if the Employee has clocked IN or OUT using the old badge and these clockings have not been downloaded to the PC then the Download is carried out before the Badge Number is changed. If this download is not carried out, these clockings will be lost.

To change the Badge Number, enter the new number in the badge Number field in the 'Data to send to the Clock' frame

| Data held on Clock | |
|--------------------|----------|
| Badge Number | 20005173 |
| Display Line 1 | MICHAEL |
| Display Line 2 | CHAUVIN |
| Fire Muster Group | 01 |
| Access Group | (None) |

| Data to send to the Clock | |
|--------------------------------|----------|
| Assign New Badge Number | 20099999 |
| Display Line 1 (12 characters) | MICHAEL |
| Display Line 2 (16 characters) | CHAUVIN |
| Fire Muster Group | 01 |
| Access Group | 07 |

Clock
Update Clock
Assigned to Clock
☒ Main Entrance
☒ Side Entrance

Click on the Save button to Save the new badge number in the PC Database.

Once the badge number is saved in the database, click the Update button:

Provided that the new badge has not already been allocated to another employee on the clock, the PC will assign the new badge number and acknowledge by transferring it into the 'Data held on Clock'

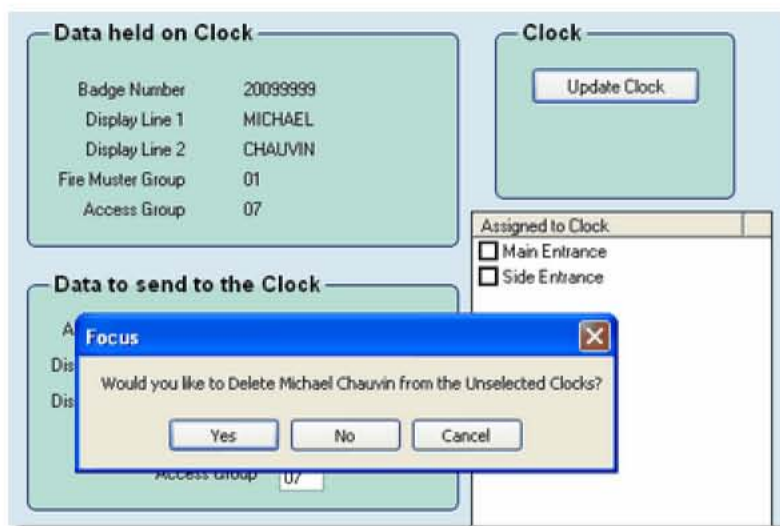
frame.

3.6.3 Deleting Employees from the Clock

Employee Menu - Clock Tab

Your clock holds data for a limited number of employees. To check the capacity of your clock, use the [System - Clock Utilities - Status](#) menu. As employees come and go through your employment, it is likely that this limit will be reached and there are many employees who have been archived from the database but who are still registered on the clock.

To delete employees from the clock, make sure that the clocks you want to delete them from are unticked in the 'Assigned to Clock' list. Then, when you click on the Update button, you will see the following:



Clicking 'Yes' will remove the employee from all unticked clocks but not from the PC database. The old Badge Number is then free to be re-used by another Employee and re-registered on the clock(s).

You can use the [Clock Utilities](#) function to directly interrogate the clock to find out how many and which employees are registered on the clock.

You may have noticed that there is no 'Delete' button on the Employee Button Bar at the top of the screen. This is because deletion has severe consequences and cannot be undone. Employees should first be [Archived](#) which stops them from appearing on employee lists and reports. They can be Unarchived or Deleted once in the Archive. You must Delete employees from the clock before you can Archive them.

3.7 Memos Tab

Employee menu - Memos Tab

Focus lets you create Employee Memos, which are free text notes. You can keep records of important events such as disciplinary matters, qualifications gained, accidents at work - anything you would like to record and have easily accessible. When you click on 'New' to create a new record, your User Name

and the time and date are automatically added. You can declare the memo as Public (other Users can read it) or Private (for your eyes only). The Memos Report allows you to print the text using the usual selection and sorting criteria.

Neal Johnson

Title: First Name: Last Name:

Payroll Number: Job Title:

| Public | Date | Time | User | Memo |
|-------------------------------------|------------|-------|-------------|--|
| <input type="checkbox"/> | 07/07/2006 | 17:26 | sarah white | Verbal warning for poor timekeeping |
| <input checked="" type="checkbox"/> | 07/07/2006 | 10:24 | sarah white | Completed Advanced First Aider Course |
| <input checked="" type="checkbox"/> | 03/05/2005 | 12:25 | sarah white | Completed basic First Aider Course |
| <input checked="" type="checkbox"/> | 12/11/2004 | 12:16 | sarah white | Accident at work. See Accident record book for details |

Contact Groups Rules Holidays Dates Clock **Memos**

3.8 User Tab

Employee menu - Dates Tab

Focus will allow you to define an unlimited number of fields to be added to the Employee Record. These are defined in the System Setup | [User Fields](#) Tab at which time the User tab becomes visible on the Employee Form as below.

| Michael Chauvin | | | |
|-------------------------|--|-------------|---------------------|
| Title | First Name | Last Name | PIN |
| Mr. | Michael | Chauvin | 365 |
| | Payroll Number | Job Title | Password |
| | 102479 | Electrician | |
| Next of Kin | Mrs. Lucy Chauvin | | Qualification |
| Next of Kin Phone | 0118 343 8894 | | Qualification Level |
| Next of Kin Relation | Wife | | Date Passed |
| Company Vehicle Model | Astra Van | | City and Guilds |
| Company Vehicle Reg | FC03 YTH | | 16th Edition |
| Tax Renewal Date | Thu Jun 14 2007 | | Fri Apr 14 2006 |
| Insurance Renewal Date | Fri Aug 24 2007 | | |
| Insurance Last Cost (£) | 893.76 | | |
| Company Vehicle Notes | MDT due on 1st July. 1/7/06 Needed 4 new tyres and a new exhaust. Consider replacing before next. | | |

[Contact](#)
[Groups](#)
[Rules](#)
[Holidays](#)
[Dates](#)
[Clock](#)
[Memos](#)
[User](#)

The fields are laid out in the order they were specified on the [System Setup form](#).

4 Times


4.1 Download

Times menu - Download



Download Shortcut Button

'Downloading' is the process whereby clocking times are transferred from the clocking terminal to the PC. As such it can only be performed by a PC with direct connectivity to the clock. You should always Download before checking Timesheets that may contain recent clockings.

Clicking on the  button causes the clock to send information relating to all clockings that have been made since the last time it was downloaded. See [Advanced Download](#) for re-collection of clockings that have already been downloaded.

It is normal to download the clockings either every day, or every week, depending upon how you have decided to implement the process of checking and correcting/authorising clockings for payment. If you use the [Watch](#) feature to indicate a Group of employees' IN/OUT status in real time, the clock is Downloaded at a frequency determined by the [Connection](#) screen.

Alternatively, your installer will be able to set up your file server to download the clock(s) at regular intervals (down to 5 seconds) to ensure that information is available in approximately real time.

4.2 Timesheets

Times menu - Timesheets



Shortcut Button

The Timesheet screen presents a week's clocking times for an employee along with the hours the system has calculated based on his/her attendance rules for rounding, breaks and overtime.

| 100902 William Nelson (Schedule: Works 3 Shift System, Weekly Rule: Works) | | | | | | | | | | | |
|--|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Double | Rate 5 | Rate 6 | Shift |
| | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x02.00 | x02.50 | |
| Mon 06 Feb | 15:54 | 20:32 | 20:59 | 02:45 | 08:30 | 01:45 | | | | | WKS3 |
| Tue 07 Feb | 15:58 | 20:27 | 20:59 | 01:02 | 08:30 | | | | | | WKS3 |
| Wed 08 Feb | 15:52 | 20:26 | 20:58 | 00:59 | 08:30 | | | | | | WKS3 |
| Thu 09 Feb | 15:56 | 20:27 | 20:58 | 03:27 | 08:30 | 02:00 | | | | | WKS3 |
| Fri 10 Feb | 15:45 | 20:29 | 21:02 | 01:00 | 08:30 | | | | | | WKS3 |
| Sat 11 Feb | | | | | | | | | | | |
| Sun 12 Feb | | | | | | | | | | | |
| Weekly Hours | 46:15 | | | | 42:30 | 03:45 | | | | | |
| Weekly Rules Applied | 46:15 | | | | 42:30 | 03:45 | | | | | |
| Weekly Gross Totals | 47:19 | | | | 42:50 | 4:69 | 0.00 | 0.00 | 0.00 | 0.00 | |

Note that the Timesheet can only show clocking details that have been downloaded from the clock or entered at the PC.

The user can edit the clocking times, the hours calculated and change the selected Daily Rule, providing he/she has access rights as set up on the [User Setup](#) screen.

The Timesheet displays up to 2 pairs of clockings per line. If more than 2 pairs are present on a particular days, extra lines are added to the display to accommodate them. Figures that have been edited at the PC are shown in Blue. The rightmost column of the Timesheet indicates the [Daily Rule](#) that has been allocated to the clockings by the system.

The **Weekly Hours** figures towards the bottom of the Timesheet is the sum of the hours for all the days in the week.

The [Weekly Rules](#) are then applied using the Weekly Limits/Targets and Clawback settings to produce the row of figures titled '**Weekly Rules Applied**'.

Finally, the Rate Factor is used to calculate the Weekly Gross Totals for that Employee for that Week.

Hourly totals can be displayed as either hours and minutes (hh:mm format) or hours and decimal parts of an hour (hh.dd format), depending on the Hours Format in the **System - Setup - General** tab. Times are always displayed in hh:mm format.

Timesheet Locking: Whenever you display a timesheet for a particular person for a particular day, the hours worked are calculated on current clockings available, current changes made, and current rules for working. This allows you to make changes and observe the results. When the timesheet has been checked and approved, and you no longer want it to be updated (e.g. if you change a relevant

Daily Rule) you can Lock the Timesheet. The  and  shows the current status of the Timesheet and allows you to change it.

Printing the Timesheets will prompt you and Lock all the timesheets affected.

Extra information is presented when the employee is working a Flexitime scheme. See [Flexitime Timesheet](#).

4.2.1 Rounded Times

Times menu - Timesheets

Times that have been rounded in the timesheet calculation are indicated by a rounded time that appears next to the mouse pointer when it hovers over the time on the timesheet:

| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Double | Rate 5 | Rate 6 | Shift |
|----------------------|-------|--------|--------------|-------|--------|--------|--------|--------|--------|--------|-------|
| | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x02.00 | x02.50 | |
| Mon 02 Jan | 08:53 | 12:59 | 13:59 | 17:34 | 08:00 | | | | | | SWD |
| Tue 03 Jan | 08:54 | 13:01 | 13:56 | 17:32 | 08:00 | | | | | | SWD |
| Wed 04 Jan | 08:55 | 12:55i | 14:00 | 17:25 | 06:45 | | | | | | SWD |
| Thu 05 Jan | 08:58 | 12:56i | 13:58 | 17:31 | 06:45 | | | | | | SWD |
| Fri 06 Jan | 08:55 | 12:59i | 13:55 | 17:29 | 07:00 | | | | | | SWD |
| Sat 07 Jan | | | | | | | | | | | |
| Sun 08 Jan | | | | | | | | | | | |
| | | | 12:45 (3/15) | | | | | | | | |
| Weekly Hours | 36:30 | | | | 36:30 | | | | | | |
| Weekly Rules Applied | 36:30 | | | | 36:30 | | | | | | |
| Weekly Gross Totals | 36:50 | | | | 36:50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |

The times that are rounded are determined by the settings in the Daily Rule. The example indicates a Grace of 3 minutes with an Increment of 15 minutes applied to an OUT time of 12:56 producing a Rounded time of 12:45. The 'i' after the clocking indicates a clocking Infringement, in this case clocking out Early for a Break. In [Daily Rules](#) you can set up different rounding for different times of day and, of course, you can turn rounding off.

4.2.2 Status Bar

Times menu - Timesheets

The status bar at the bottom of the timesheet includes further information when the mouse pointer hovers over a clocking, an edited Time or Total and a Daily Rule indicator.

In the case of an edited TIME it shows, for example:

Original: IN at 08:07:29 Edit Reason: Delayed by road accident Edited: 04/01/2005 12:11:20 (User:Neil Bradford)

Original TIME if any;
The reason given for editing the TIME;
When the edit took place;
Who carried out the edit.

4.2.3 Timesheet Editing

Times menu - Timesheets

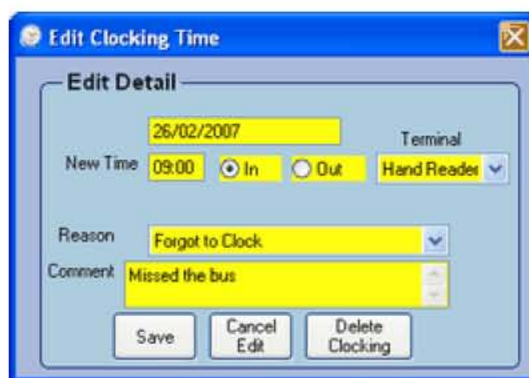
You can Add, Edit and Delete both TIMES and TOTALS as well as changing the Shift allocation. TIMES would be changed when, for instance, an employee forgets to clock in, or is late for a valid reason. TOTALS would be modified to allocate hours to an approved absence. In all cases a reason may be entered for the change and an Audit Log entry is created, recording what change was made, who made it, when it was made and why. The shift can be changed if, for instance, the system allocates times to the Default Shift, when the user can force the times onto the correct shift.

Editing TIMES

To edit a clocking TIME, simply click on the desired cell on the Timesheet and the Edit Time screen will be presented:

The user can change the type of clocking (IN or OUT), the time of the clocking, and the reason for the change.

The changes can be Saved or Cancelled or the clocking can be completely Deleted. All changes are logged in the Audit Trail.



Terminal: FOCUS remembers which terminal the employee clocked on, and this information can be used to show hours worked by location. Here the Terminal corresponds to the name of the [Connection](#) set up and can be selected from the drop down list.

Editing DAILY TOTALS

Use this feature to Book an Absence or clear an exception. For instance, if the system detects the employee has failed to work the expected number of hours for a shift, it will mark it as an exception. You can then allocate a reason for this and/or authorise payment of extra hours. Click on cell holding the hours calculated to edit its contents. When you click on the cell, the system presents extra information regarding availability of employees in the groups this employee belongs to, helping you to make decisions whether or not to allow time off e.g. holiday.

Adding Timesheet Rows.

If you need to add rows to a timesheet to add clocking Times, click on the left most column of the day in question and a new, empty, row will be inserted.

Editing the SHIFT

Click on the Shift cell and the Edit Shift Allocation screen appears. The User can change the shift allocation or Show the Rules for the shift in the list. When the shift is changed the timesheet recalculates the hours for

the day in question.

All changes are logged in the Audit Trail.

4.2.4 Weekly Totals

Times menu - Timesheets

Weekly Totals are calculated by applying Weekly Rules to a week of Daily Totals. The Weekly Totals are used by many of the Reports and Export of hours worked.

Previously calculated Weekly Totals can be affected by:

1. Downloading new clockings from the clock;
2. Editing a Timesheet;
3. Modifying Attendance Rules;
4. Changing the Start of Week Day.

Each time you display an UnLocked Timesheet, the hours worked are calculated based on the attendance rules defined at that time.

For instance, if your week starts on a Monday and you download the clock on Wednesday and view the Timesheet, the Weekly Totals for that week to date will be calculated based on existing rules and these totals will appear on any report or export produced.

Note that changing attendance rules (3) does not automatically re-calculate Weekly Totals retrospectively. If you need to recalculate retrospectively.

Changing the Start of Week Day (4) is similar to changing the attendance rules in that it affects weekly totals calculations going forward but not retrospectively. If you change your Start of Week Day once the system has been up and running for a while you will see that the Reports indicate no hours worked. This is because Totals don't exist for the new Week definitions.

4.2.5 Infringements

Times menu - Timesheets

Infringement monitoring is a powerful tool to measure time lost through poor time keeping. Infringements are attached to clocking times that have broken the [Daily Rules](#) that have been applied to the employee clockings. Infringements are shown on the Timesheet view by a greyed time with a letter 'i' attached. The reason and time lost is shown in the Status window when you hover the mouse pointer over the infringement clocking.

Infringements that the system can detect are:

1. Clocked IN late at the start of the Shift;
2. Clocked OUT early at the end of the Shift;
3. Clocked OUT early at the start of a Break;

4. Clocked IN late at the end of a Break;
5. Clocked within the Break Band but took too long a Break.

[Infringement Reports](#) show how much time has been lost through poor time keeping.

Once an infringement clocking has been detected, it can only be removed by editing the clocking time (or changing the Daily Rule/Work Schedule).

4.2.6 Exceptions



Shortcut Button.

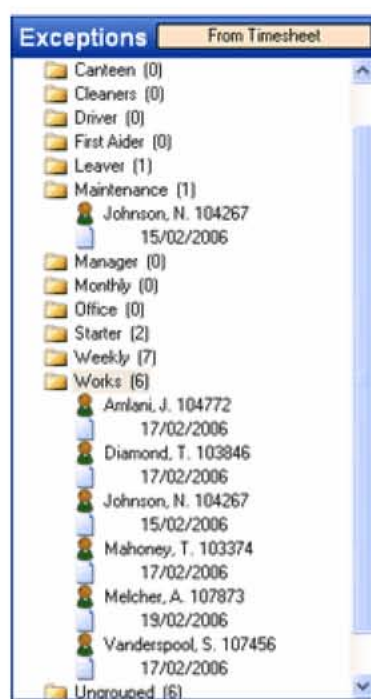
The Exceptions button presents a list of timesheet anomalies that may need to be dealt with or authorised. This acts as a 'To Do' list for regular timesheet maintenance.

Exceptions are split into 7 categories:

1. The employee did not clock on a day when they were scheduled to work (Absent);
2. Although the employee clocked, the expected number of hours were not worked (Target Hours);
3. The employee worked on a day booked as a Public Holiday
4. The employee worked unexpected times and was allocated to the Default Shift
5. The employee worked more hours than expected (Unauthorised Overtime)
6. The employee missed a clocking (usually forgot to clock out)
7. The employee clocked IN or OUT on Business

Exceptions can be shown for a range of dates such as 'This Week', 'Last Week', and are arranged into a hierarchical view starting with Exception Type, then Group, then Employee, then Date.

Due to the way the Grouping feature works within Focus, where an employee may be present in more than one Group, it stands to reason that an Exception may appear more than once in the list.



In this example, because Johnson N. is in both the Maintenance and the Works Group, the Exception on 15th February appears in both Groups, meaning that when this Exception is removed the number of this type of Exception will reduce by 2.

Exceptions stay on the system until you remove, or Authorise them, by allocating a valid reason for the anomaly. You can decide whether you want to pay for time off and allocate a reason for doing so. Exceptions will appear on the Timesheet in red and on the employee's annual planner.

Clicking on the Exception item in the list will open the timesheet holding that Exception. The Exceptions List and Timesheet can be used interactively to work through all the exceptional clockings within the chosen period of time. Right click on the list of Exceptions to refresh it or start bulk Authorisation of Overtime..

Absence (Conditions for):

An employee is registered Absent (System) on a Day if:

- the Day is after the [System Start Day](#) AND
- the employee did not clock on the Day AND
- they had a Daily Rule programmed in the first column of their Work Schedule OR they were Rostered to work AND
- they had Started with the company before the Day AND
- the employee had not left the Company before the Day.

Target Hours and Unauthorised Overtime are triggered by the conditions you set up in the [Daily Rule on the Exceptions Tab](#). Target Hours occurs when the employee works less than the hours expected at a certain Rate. This will flag up late arrival, early departure and forgotten clockings. Unauthorised Overtime happens when an employee works more than the number of hours you set as the threshold for a certain Rate.

When editing a timesheet, if you left click hours that represent Unauthorised Overtime, you will be presented with a screen such as:

Authorise

03 Apr 2007

Amount To Authorise: 02:00 Rate 2: 3

Reason: Authorised Overtime

Comment: Stayed Late

Save Cancel Edit Manual Edit

2:00 hours is the amount of overtime worked. Reduce this if you do not want to authorise the full amount. Rate 2 is the Rate the overtime was accrued at as defined by the Daily Rule. To authorise overtime FOCUS moves the part of the 2:00 to a different rate which is rate 3 in the example. Here we have defined and selected an Edit Reason as 'Authorised Overtime'. You can add any free text comment. The Manual Edit button takes you to the normal edit screen where you will be able to edit the hours worked as normal (without necessarily Authorising them as Overtime).

If you right click anywhere in the Exceptions tree view you will be offered the options to 'Refresh' (the tree view exceptions list) and 'Authorise' (any Unauthorised Overtime). If you select Authorise, a list of all employees with Unauthorised Overtime for the date range will be displayed:

Authorise

Report Period: 7 Days

Start Date: Mon 02 Apr 2007 End Date: Sun 08 Apr 2007

Groups: Employees Payroll

| Number | First Name | Last Name | Date | Rate | Hours | Rule | Rule Start | Rule End | Clock In | Clock Out |
|--------|------------|-----------|------------|------|-------|------|------------|----------|----------|-----------|
| 107445 | Karen | Miller | 06/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:15 |
| 107445 | Karen | Miller | 04/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 107445 | Karen | Miller | 02/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:45 |
| 103846 | Theresa | Diamond | 05/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:45 |
| 103846 | Theresa | Diamond | 04/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 07:45 | 19:30 |
| 103846 | Theresa | Diamond | 03/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 107873 | Anthony | Melcher | 04/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 107873 | Anthony | Melcher | 03/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 108232 | Karishma | Singh | 05/04/2007 | 2 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 20:00 |

Authorise...

The Hours column shows the amount of overtime that has been worked and you can see from the actual clocking times why overtime has been accrued. Using this Bulk Authorise screen you can authorise part or all of the overtime worked for some or all of the employees listed. When overtime is authorised, each occurrence generates an entry in the [Audit Log](#).

If you don't wish to authorise overtime for all employees in the list, left click on the ones you do want to authorise before clicking the 'Authorise...' button.



Enter the amount of hours you are prepared to authorise, the Rate at which you will be paying the overtime and a Reason and Comment.

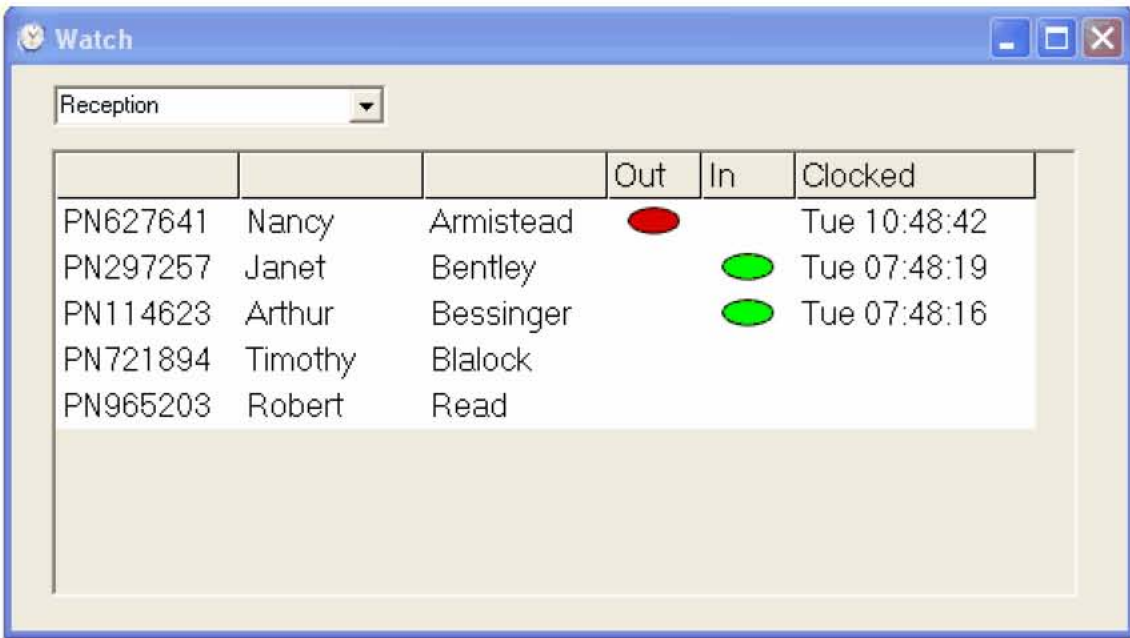
4.3 Watch

Times menu - Watch



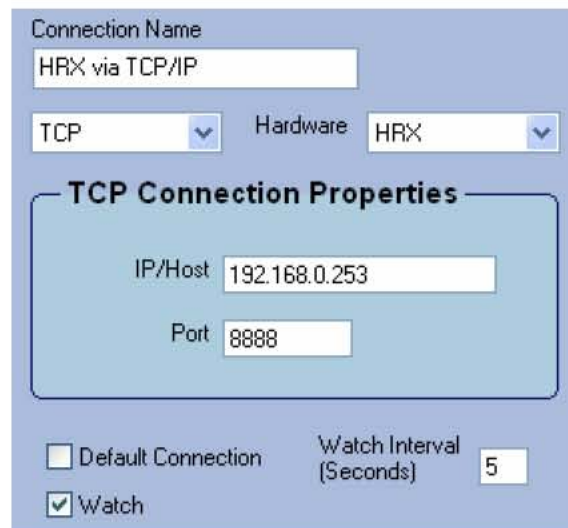
Shortcut Button.

The Watch screen allows you to display a real time view of employees' IN/OUT status.



This screen is a view of the clocking data held in the FOCUS database which is updated by reading the

terminals at a frequency set in the **System | Connections** screen. The example below shows that the Watch screen will be updated every 5 seconds.



The screenshot shows a 'Connection Properties' dialog box. At the top, 'Connection Name' is 'HRX via TCP/IP'. Below it, 'TCP' is selected in a dropdown menu, and 'Hardware' is 'HRX'. A section titled 'TCP Connection Properties' contains 'IP/Host' as '192.168.0.253' and 'Port' as '8888'. At the bottom, there are two checkboxes: 'Default Connection' (unchecked) and 'Watch' (checked). To the right of these is a 'Watch Interval (Seconds)' field set to '5'.

4.4 PC Clocking

Times menu - PC Clocking

This Option allows individual Employees to clock IN and OUT at their PCs as well as, or instead of, at the clocking terminals. An Employee is given access to the feature by assigning him/her a PIN number and a Password in their Employee Record. They can then clock IN/OUT from the **Times | Punch** menu on the main FOCUS software (if they have access to the full software) or they can use the separate clocking utility which gives them access only to Clock IN/OUT and view their timesheet and calendar.



The screenshot shows a window titled 'Logged In: Chauvin, Michael. 102479'. The main area displays 'You Are: IN' and 'Last: Sun 01 Jun 14:15'. There are three buttons: 'Clock In', 'Clock Out', and 'Log Out'. Below these are links for 'Timesheet', 'Calendar', and 'Change Password'. At the bottom, a status bar shows '02/06/2008 13:44:38'.

The PC Clocking feature is an extra cost option available from your FOCUS supplier.

5 Reports



Shortcut Button

The Reports menu allows you to select and sort data by several criteria which vary depending on the

type of report:

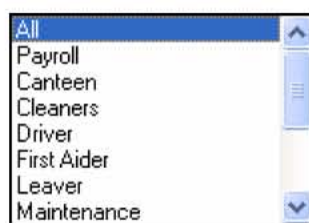
Date Range (Report Period)

A screenshot of a 'Report Period' dialog box. It has a title bar 'Report Period'. Inside, there's a dropdown menu set to '1 Week'. Below this, there are two date fields: 'Start Date' and 'End Date'. The 'Start Date' field shows 'Mon 03 Jul 2006' and the 'End Date' field shows 'Sun 09 Jul 2006'. Each date field has a small calendar icon to its right.

Dates are selected using one or more Date Selector . When you pick a date for a weekly report, a Start Date will set up to the starting day of the week chosen and an End Date will set up to the date of the last day in the week selected.

Employee Selection

Use the drop down list of Groups to select a single Group of employees for your report, or 'All'.



At the bottom of the list of Groups you will see 'Multiple Groups'. Click on this to expose the list of Groups and a set of check boxes so that you can select a number of groups to be included in the report.

If you want to select a single employee for the report or a subset of those shown, simply click on the employees in the list to select them for printing. Hold the shift key down and click in the employee list to select a block of records.

Sort Order

You can sort your report by any column in Ascending or Descending order simply by clicking on the heading at the top of the column.

Report Generation



Once you have set up your report with the range of information you require and the order in which you want it sorted, click on the  print button, or in the case where multiple report options are available, drop down the list  and select the desired report. With the report on screen, further controls are available:



Table of Contents. For example, in a Timesheet Report covering several pages, the Table of Contents will contain a list of employees on the report. If the Table of Contents is not visible, click on this button in the top left hand corner of the report screen to open the Table of Contents. Then you can go to any individual's timesheet by clicking on his/her name in the table.



PDF Outputs the Report as a PDF file. This is the format you would choose if you want to email the report.



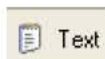
Excel Generates an Excel spreadsheet (.xls) file. You can use this format if you want to do further calculation, formatting of charting on the data in the report.



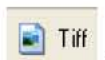
HTML Produces an HTML page which may be viewed by a web browser.



RTF Outputs a Rich Text File.



Text Outputs a Plain Text File.



Tiff Outputs a Tiff Graphical File.

5.1 Timesheets

Reports menu - Timesheets

The Timesheets Report generates several formats of timesheet report for specified employees for a given week.

Click on the  button to expose the list of available reports.

Timesheet Normal:

Once the report has been generated you can use the contents list to go to a particular employee's timesheet on the report:

| | | | | | | | | | | | | | | | | | | |
|-------------------------|---|----|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|
| Contents | X | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| Jayna Amlani | | 2 | | | | | | | | | | | | | | | | |
| Megan Broadhurst | | 3 | | | | | | | | | | | | | | | | |
| Michael Chauvin | | 4 | | | | | | | | | | | | | | | | |
| Theresa Diamond | | 5 | | | | | | | | | | | | | | | | |
| Eva Gillespie | | 6 | | | | | | | | | | | | | | | | |
| Martha Hackett | | 7 | | | | | | | | | | | | | | | | |
| Neal Johnson | | 8 | | | | | | | | | | | | | | | | |
| Rahul Kohli | | 9 | | | | | | | | | | | | | | | | |
| Thomas Mahoney | | 10 | | | | | | | | | | | | | | | | |
| Anthony Melcher | | 11 | | | | | | | | | | | | | | | | |
| Karen Miller | | 12 | | | | | | | | | | | | | | | | |
| Amrita Mistry | | | | | | | | | | | | | | | | | | |
| Timothy O'Hara | | | | | | | | | | | | | | | | | | |
| Bruce Palmer | | | | | | | | | | | | | | | | | | |
| Keith Roberts-Horsfield | | | | | | | | | | | | | | | | | | |
| Karishma Singh | | | | | | | | | | | | | | | | | | |
| Bettina Smith | | | | | | | | | | | | | | | | | | |
| Scott Vanderspool | | | | | | | | | | | | | | | | | | |
| Alex Varis | | | | | | | | | | | | | | | | | | |
| Kathryn Warthing | | | | | | | | | | | | | | | | | | |
| Karen Yates | | | | | | | | | | | | | | | | | | |

| | | | | | | | | | | | | | | | | | | |
|------------------------|--|---------------------|-------|-------|-------|--------|--------|--------|--------|--------|--------|--|--|--|--|--|--|--|
| Mon 23 Jan 2006 | | Jayna Amlani | | | | | | | | | | | | | | | | |
| 104772 | | | | | | | | | | | | | | | | | | |
| | | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Rate 4 | Sick | Hol | | | | | | | |
| | | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x02.00 | x02.50 | | | | | | | |
| Mon 23 Jan | | 15:51 | 20:32 | 21:03 | 03:28 | 08:30 | 02:00 | | | | | | | | | | | |
| Tue 24 Jan | | 15:51 | 20:32 | 21:02 | 00:58 | 08:30 | | | | | | | | | | | | |
| Wed 25 Jan | | 15:55 | 20:29 | 21:03 | 00:58 | 08:30 | | | | | | | | | | | | |
| Thu 26 Jan | | 15:54 | 20:34 | 20:59 | 01:02 | 08:30 | | | | | | | | | | | | |
| Fri 27 Jan | | 15:46 | 20:30 | 21:03 | | 04:30 | | | | | | | | | | | | |
| Sat 28 Jan | | | | | | | | | | | | | | | | | | |
| Sun 29 Jan | | | | | | | | | | | | | | | | | | |
| Weekly Totals | | 40:30 | | | | 40:30 | | | | | | | | | | | | |
| Weekly Gross | | 40:50 | | | | 40:50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | | | | | | | |

| | | | | | | | | | | | | | | | | | | |
|-------------------|-----------------------|------------|--------------|-------------|--|--|--|--|--|--|--|--|--|--|--|--|--|--|
| Edit Hours | | | | | | | | | | | | | | | | | | |
| Date | Reason | Sum | Hours | Rate | | | | | | | | | | | | | | |
| 27/01/2006 | Target Hours (System) | Add | 00:00 | 1 | | | | | | | | | | | | | | |

Timesheets can also be printed for a single employee from the main Timesheet screen in the **Times - Timesheet** menu.

Timesheet Condensed:

Prints 4 timesheets to a page and excludes the detail of edits made to the timesheet.

SummaryByDay:

| Weekly Summary By Day | | | | | | | | | |
|--|--------|-------|-------|-------|-------|-------|-------|-------|--------|
| Week Commencing 13 Mar 2006 | | | | | | | | | |
| Employees in Office Fixed Hours Ordered by Last Name | | | | | | | | | |
| Name | Number | Hours | | | | | | | Total |
| | | Mon | Tue | Wed | Thu | Fri | Sat | Sun | |
| Ackerman | 107345 | 07:00 | 08:00 | 08:00 | 08:50 | 08:00 | | | 00:00 |
| Edwards | 109724 | 06:50 | 07:00 | 07:00 | 06:50 | 07:00 | | | 34:40 |
| Fairbanks | 108554 | 07:00 | 06:50 | 08:50 | 09:00 | 06:50 | 02:45 | | 41:15 |
| Ghelani | 104399 | 06:50 | 06:50 | 06:50 | 07:00 | 06:35 | | | 34:05 |
| Grand Totals | | 27:40 | 28:40 | 30:40 | 31:40 | 28:25 | 02:45 | 00:00 | 110:00 |

The Weekly Summary By Day report prints the hours worked by employees on each day of the week.

Detail By Day:

The Detail By Day report has the same daily hours as the Summary Report and also includes the first and last clocking of each day.

5.2 Payroll

Reports menu - Payroll

After downloading employees' clocking times, checking and amending the timesheets, you can export calculated hours worked to your Payroll software.

| Number | Title | First Name | Last Name | Rate 1 | Rate 2 | Rate 3 | Double | Rate 5 | Rate 6 |
|--------|-------|------------|-------------------|--------|--------|--------|--------|--------|--------|
| 102874 | Mrs. | Susan | Aitken | 44:00 | | | | | |
| 104772 | Mrs. | Jayna | Amiani | 42:30 | 04:00 | | | | |
| 102997 | Mrs. | Megan | Broadhurst | 42:30 | | | | | |
| 102479 | Mr. | Michael | Chauvin | 25:00 | | | | | |
| 103846 | Mrs. | Theresa | Diamond | 38:30 | 01:15 | | | | |
| 108347 | Miss | Eva | Gillespie | 38:30 | 06:00 | | | | |
| 108489 | Mrs. | Martha | Hackett | 42:30 | | | | | |
| 104665 | Mr. | Michael | Hainsel | 34:45 | 02:00 | | | | |
| 104267 | Mr. | Neal | Johnson | 09:15 | | | | | |
| 107677 | Mr. | Rahul | Kohli | 42:30 | 04:00 | | | | |
| 103374 | Mr. | Thomas | Mahoney | 46:00 | 06:00 | | | | |
| 107873 | Mr. | Anthony | Melcher | 43:30 | 03:15 | | | | |
| 107445 | Mrs. | Karen | Miller | 41:15 | 03:45 | | | | |
| 106744 | Mrs. | Amrita | Mistry | 42:30 | 08:45 | | | | |
| 100902 | Mr. | William | Nelson | 42:30 | 05:45 | | | | |
| 102466 | Mr. | Timothy | O'Hara | 08:00 | | | | | |
| 105624 | Mr. | Bruce | Palmer | 58:25 | | | | | |
| 105972 | Mr. | Keith | Roberts-Horsfield | 50:30 | | | | | |
| 108232 | Miss | Karishma | Singh | 42:30 | 01:30 | | | | |
| 104628 | Mrs. | Bettina | Smith | 38:30 | 02:00 | | | | |

This report allows you some degree of control over the output format. You can specify Landscape/Portrait, whether to suppress zero hours worked and the size of the font to use.

Hours included in the Payroll can be specified by Date Range and Employee Grouping.

If the date range is specified as a multiple of whole Weeks (i.e. By Week), the hours taken will be the Weekly Hours from the timesheet which are adjusted by the Weekly Rules to produce the Weekly Totals. If the date range is specified in Days (i.e. By Date), you can specify any date range for the payroll and Weekly Rules are NOT applied. The total in this case is the sum of the Daily Totals for all the days in the date range.

In this way you can run your payroll calculations for any period of whole weeks, days or months.

Use the  **Export** button to generate an export file in the chosen format.

Use the  button to select the Payroll Summary or Payroll Detail Report.

The Payroll Summary report lists the hours worked per employee during the period for manual input to your payroll programme. This report may be faxed or e-mailed to a payroll bureau.

The Payroll Detail Report lists the daily clocking times, shift rule allocated and Daily Hours for the

payroll period. It also provides a summary of Sickness and Holidays over the period:

| Date | IN | OUT | IN | OUT | Shift | Rate 1 | Rate 2 | Rate 3 | Double | Rate 5 | Rate 6 |
|-----------------|-------|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|
| Mon 09 Jan 2006 | 08:53 | 13:04 | 13:57 | 17:28 | FX1 | 08:00 | | | | | |
| Tue 10 Jan 2006 | 08:50 | 13:01 | 14:01 | 17:25 | FX1 | 08:00 | | | | | |
| Wed 11 Jan 2006 | 08:53 | 13:04 | 14:03 | 20:27 | FX1 | 08:30 | | | | | |
| Thu 12 Jan 2006 | 08:53 | 13:00 | 14:00 | 17:28 | FX1 | 00:00 | | | | | |
| Fri 13 Jan 2006 | 08:57 | 12:55 | 13:57 | 17:25 | FX2 | 07:50 | | | | | |
| Sat 14 Jan 2006 | | | | | | | | | | | |
| Sun 15 Jan 2006 | | | | | | | | | | | |
| | | | | | | 32:20 | 00:00 | 00:00 | 00:00 | 00:00 | 00:00 |

| <u>Sickness Summary</u> | | | <u>Annual Holiday Summary</u> | | |
|-----------------------------|-------------|---------------|-------------------------------|------------|--|
| | Paid | Unpaid | | | |
| Sick Days Since 01/01/2006: | 0 | 0 | Holiday Start Date: | 01/01/2006 | |
| Sick Days In This Period: | 2 | 0 | Annual Entitlement: | 20 + 3 | |
| | | | Holiday Brought Forward: | 23 | |
| | | | Holiday Taken in Period: | 0 | |
| | | | Holiday Carried Forward: | 23 | |
| | | | Holiday Booked After Period: | 6 | |

| <u>Paid Sick Periods</u> | | | | | |
|--------------------------|------------|------------|---------------|-----------|--------------------------|
| From Prev | From | To | Calendar Days | Work Days | Into Next |
| <input type="checkbox"/> | 11/01/2006 | 12/01/2006 | 2 | 2 | <input type="checkbox"/> |

The Sickness summary is for the year from the 1st January of the year in which the Payroll Period falls, whereas the Holiday period is from the employee's Holiday Start Date for the current year.

The Annual Holiday Entitlement shows the basic Entitlement + Extra Days.

The Holiday Brought Forward is the Total Entitlement minus Holidays taken up to the start of the Payroll Period.

The Paid Sick Periods sub report lists the periods which may be used in the calculation of Statutory Sick Pay (SSP). The Sick Period starts with a day when an absence is booked with a reason which has a type of 'Sick Paid'. The period continues until either:

The employee has clocking times, i.e. comes in to work **OR** has an absence reason booked that has a type which is not 'Sick Paid'.




The period will end on a day which has a 'Sick Paid' absence. The flags 'From Prev' and 'Into Next' indicate whether the Sick Period runs into or out of the current Pay Period.

The Absence Periods Report produces a similar output but can be applied to any of the Absence Reasons or Absence Types.

5.3 Totals By Employee

Reports menu - Totals by Employee

Generates the total hours worked at the 6 different pay rates broken down by Employee. Information is available in 3 different forms:




1.  List report - choice of text, bar or combination report.
2.  Pie Chart - breakdown by rate - hours or percentages.
3.  Bar Graph - breakdown by rate - hours or percentages.

The period for the report encompasses a whole number of weeks.

5.4 Totals By Week

Reports menu - Totals by Week

Generates the total hours worked at the 6 different pay rates for all the employees in the chosen group, broken down by week. Information is available in 3 different forms:

1.  List report - 1 line per week showing the 6 rates, total hours worked and overtime.
2.  Area Chart - for the group showing hours worked by rate over time.
3.  Bar Graph - for the group showing hours worked by rate over time.

5.5 Employees

Reports menu - Employees

The Employees report allows you to specify the content and order of the columns (as well as the usual sort order).


Columns

Presets Clear

Title First Name Last Name Payroll Number Badge Number Job Title Work Schedule Weekly Rul

| Title | First Name | Last Name | Payroll Number | Badge Number | Job Title | Work Schedule | Weekly Rul |
|--------------|------------|-----------|----------------|--------------|---------------|----------------------------|------------|
| Mrs. Jayna | Amlani | | 104772 | 20005162 | Operator | Works 3 Shift System | Works |
| Mrs. Megan | Broadhurst | | 102997 | 34343434 | Operator | Twilight 16:00 to 01:00 | Works |
| Mr. Michael | Chauvin | | 102479 | 20005173 | Electrician | Uses Rota | Works |
| Mrs. Theresa | Diamond | | 103846 | 20005210 | Supervisor | Works 3 Shift System | Works |
| Miss Eva | Gillespie | | 108347 | 09999993 | Cook/Waitress | Works 3 Shift System | Works |
| Mrs. Martha | Hackett | | 108489 | 20005215 | Supervisor | Works 3 Shift System | Works |
| Mr. Neal | Johnson | | 104267 | 20005217 | Mechanic | Staff 09:00 AM to 05:00 PM | Staff |
| Mr. Rahul | Kohli | | 107677 | 20005218 | Cook | Works 3 Shift System | Works |

Each drop down box exposes the list of available column types. Select 'none' if you want the column to be blank in which case it takes up no room on the report. Column widths can be altered by dragging on the column title. The 'Preset' button sets the columns to their default state, which produces a quick and easy basic Employee List Report. The 'Clear' button sets all columns to 'none'.

The  button exposes the choice of either a List Report based on the columns you have chosen or a Detail Report which uses one page per employee and is of fixed format (i.e. is not controlled by your set up of columns).

5.6 Holidays

Reports menu - Holidays

The Holiday report produces a list showing the holiday status for a Group of Employees. As well as showing the Holiday Year Start Date it also lists:

- Yearly Allowance
- Holiday Brought Forward from previous period
- Adjustment Days (or Hours) allowed this year (e.g. Days in Lieu)
- Number of Days (or Hours) personal holiday Taken to date.
- Number of days (or Hours) Booked but not taken.
- Maximum allowance that will be Carried Forward
- Amount that will be Carried Forward to next period

| Holidays (Days) | | | | | | | | | | | |
|--|------------|-----------|------------|-----------|-------------|--------|-------|--------|---------|-----------|-----------|
| Employees Holidays For 2007 Employees in Monthly Ordered by Surname | | | | | | | | | | | |
| Number | First Name | Last Name | Year Start | Allowance | Brought Fwd | Adjust | Taken | Booked | Balance | Max Carry | Carry Fwd |
| 107345 | Virginia | Ackerman | 01/01/2007 | 20 | | | 20 | | | 2 | |
| 109724 | Gavin | Edwards | 01/01/2007 | 20 | | | 19 | | 1 | 2 | 1 |
| 108554 | Dawn | Fairbanks | 01/01/2007 | 20 | | 2 | 17 | | 5 | 2 | 2 |
| 104399 | Riam | Ghelani | 01/01/2007 | 20 | | | 24 | | -4 | 2 | -4 |
| 104665 | Michael | Hainsel | 01/01/2007 | 20 | | | 20 | | | 2 | |
| 109224 | William | Russell | 01/01/2007 | 20 | | | 19 | | 1 | 2 | 1 |
| 106862 | Mark | Stanford | 01/01/2007 | 20 | | 1 | 18 | | 3 | 2 | 2 |
| 105498 | Karen | Yates | 01/01/2007 | 20 | | 3 | 18 | | 5 | 2 | 2 |
| | | | | 160 | | 6 | 155 | | 11 | 16 | 4 |

5.7 Memos

Reports menu - Memos

| Number | First Name | Last Name | Date | Time | Access | User | Text |
|--------|------------|-----------|------------|-------|--------|------|--|
| 104267 | Neal | Johnson | 07/07/2006 | 17:26 | s | | Verbal warning for poor timekeeping |
| 104267 | Neal | Johnson | 07/07/2006 | 10:24 | Public | s | Completed Advanced First Aider Course |
| 104267 | Neal | Johnson | 03/05/2005 | 12:25 | Public | s | Completed basic First Aider Course |
| 104267 | Neal | Johnson | 12/11/2004 | 12:16 | Public | s | Accident at work. See Accident record book for details |

This screen is used to produce a report of employee memos. Options are available to include your own and other user's memos. Only a user with Administrator privileges will be able to print Other Users' Private Memos.

5.8 Cost Variance

Reports menu - Cost Variance

The Cost Variance Report shows how employees actually work compared to planned working time set up on the Rota or Work Schedule. I

| Costs | | | | | | | | | |
|--------|-------|------------|-----------|---------------|--------------|----------------|--------------|-------------|---------------|
| Number | Title | First Name | Last Name | Planned Hours | Actual Hours | Variance Hours | Planned Cost | Actual Cost | Variance Cost |
| 102466 | Mr. | Timothy | O'Hara | 08:00 | 08:00 | 00:00 | 40.00 | 40.00 | 0.00 |
| 102479 | Mr. | Michael | Chauvin | 10:00 | 01:15 | -08:45 | 60.00 | 7.50 | -52.50 |
| 104267 | Mr. | Neal | Johnson | 25:00 | 21:45 | -03:15 | 150.00 | 130.50 | -19.50 |
| 108924 | Mr. | Alex | Varia | 20:00 | 21:30 | 01:30 | 100.00 | 107.50 | 7.50 |
| Totals | | | | 63:00 | 52:30 | -10:30 | 350.00 | 285.50 | -64.50 |

Planned Hours are calculated using the Standard Hours from the Daily Rule which is extracted from either the Rota or the leftmost column of the Work Schedule, whichever is used to programme the employees work pattern.

Actual Hours are derived from the Timesheet.

Variance is positive if Actual Hours are greater than Planned.

The Cost columns are calculated by multiplying the hours worked by the Rate Factor for the employee and the Employee's Gross Pay from the employee form.

The Pay columns will not be displayed if the System User does not have access to view Gross Pay.

5.9 Bradford Factor

Reports menu - Bradford factor

It has been recognised as a result of research at Bradford University that several short periods of absence are more disruptive than one long period, given the same number of total days absent. The Bradford Factor is a method of quantifying the disruption caused by a pattern of absence. The definition of the Bradford Factor is:

$$S \times S \times D = \text{Bradford Factor}$$

Where: **S** is the number of occasions of absence in a period and
D is the total number of days' absence in the period.

Focus allows you to nominate Sick Paid and Sick Unpaid as the absence types for Bradford Factor Analysis.

A period of absence is defined in the same way as the periods for the Absence Periods report. See the example Calendar below:

| 0149 Michael Murdoch | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|----------------------|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|
| | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | | | |
| Apr 2006 | | | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | |
| May | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | | |
| Jun | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | |
| Jul | | | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 |
| Aug | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | |
| Sep | | | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | |

The period 4 Apr 2006 to 20 Apr 2006 is treated as one period. In this case the employee is scheduled using the Rota and is not rostered for work on 6th to 8th April etc. and as such is not absent at this time. The Absence Period Report may be used to confirm this.

| Absence Periods Report | | | | | | |
|---|---------|---------|------------|------------|---------------|-----------|
| Sat 01 Apr 2006 to Sun 12 Nov 2006 (226 Days) | | | | | | |
| Employees in Bradford Ordered by Last Name | | | | | | |
| Absences: Sick - Paid/Unpaid (Type) | | | | | | |
| | | | Start | End | Calendar Days | Work Days |
| 0149 | Michael | Murdoch | 04/04/2006 | 20/04/2006 | 17 | 10 |
| | | | 03/07/2006 | 05/07/2006 | 3 | 3 |
| | | | | | 20 | 13 |

In this case the employee has 2 periods of absence for a total of 13 days.

$$\text{Bradford Factor} = 2 \times 2 \times 13 = 52$$

5.10 Working Time Regulations

Reports menu - Working Time Regulations

This report generates statistics required to satisfy the Average Hours Worked requirements of the Working Time Regulations. A list report shows, for each employee, the number of hours worked, and the calculated average.

A detail report shows working hours for each employee over time:

| 2 Weeks | | 07/11/2005 - 20/11/2005 | |
|--------------------------------------|----------------|-------------------------|-------------------------------------|
| PN77623 | | David Bradshaw | |
| Day | Date | Hours | Excluded Day |
| 1 | Mon 07/11/2005 | 08.00 | <input type="checkbox"/> |
| 2 | Tue 08/11/2005 | 08.00 | <input type="checkbox"/> |
| 3 | Wed 09/11/2005 | 08.50 | <input checked="" type="checkbox"/> |
| 4 | Thu 10/11/2005 | 08.00 | <input checked="" type="checkbox"/> |
| 5 | Fri 11/11/2005 | 05.00 | <input checked="" type="checkbox"/> |
| 6 | Sat 12/11/2005 | | <input type="checkbox"/> |
| 7 | Sun 13/11/2005 | | <input type="checkbox"/> |
| 8 | Mon 14/11/2005 | 08.00 | <input type="checkbox"/> |
| 9 | Tue 15/11/2005 | 08.75 | <input type="checkbox"/> |
| 10 | Wed 16/11/2005 | 07.25 | <input checked="" type="checkbox"/> |
| 11 | Thu 17/11/2005 | 08.00 | <input type="checkbox"/> |
| 12 | Fri 18/11/2005 | 05.00 | <input checked="" type="checkbox"/> |
| 13 | Sat 19/11/2005 | | <input type="checkbox"/> |
| 14 | Sun 20/11/2005 | | <input type="checkbox"/> |
| 15 | Mon 21/11/2005 | 08.00 | <input type="checkbox"/> |
| 16 | Tue 22/11/2005 | 08.50 | <input type="checkbox"/> |
| 17 | Wed 23/11/2005 | 08.00 | <input type="checkbox"/> |
| 18 | Thu 24/11/2005 | 08.00 | <input type="checkbox"/> |
| 19 | Fri 25/11/2005 | 05.00 | <input type="checkbox"/> |
| | | 78.25 | 5 |
| Average Hours Per Week, Over 2 Weeks | | 39.13 | |

The detail report above shows the worked hours for a 2 week reference period. There are 5 excluded days which are not included in the calculation. After the reference period, the next 5 normal worked days are used to replace the excluded days.

5.11 Infringements

Reports menu - Infringements

The Infringement Report lists the number of Infringements for each individual in a group over a period of time. You can hover the mouse pointer over the column headings to see a fuller description of the infringements.

| Payroll | First Name | Last Name | LIN | EOU | BLI | BEO | BOR | FCO | All | Time | Rounded |
|---------|------------|-------------|-----|-----|-----|-----|-----|-----|-----|--------|---------|
| 102479 | Michael | Chauvin | 0 | 2 | 0 | 0 | 0 | 0 | 2 | 08:32 | 08:45 |
| 103846 | Theresa | Diamond | 0 | 0 | 0 | 0 | 0 | 2 | 2 | 23:58 | 03:00 |
| 108347 | Eva | Gillespie | 1 | 0 | 0 | 0 | 0 | 1 | 2 | 33:02 | 12:00 |
| 108489 | Martha | Hackett | 3 | 0 | 0 | 0 | 0 | 0 | 3 | 71:42 | 00:03 |
| 104267 | Neal | Johnson | 2 | 0 | 0 | 0 | 0 | 0 | 2 | 00:35 | 01:00 |
| 107677 | Rahul | Kohli | 3 | 0 | 0 | 0 | 0 | 0 | 3 | 71:41 | 00:03 |
| 103374 | Thomas | Mahoney | 2 | 1 | 0 | 0 | 0 | 0 | 3 | 54:52 | 07:02 |
| 107873 | Anthony | Melcher | 3 | 1 | 0 | 0 | 0 | 0 | 4 | 31:50 | 08:03 |
| 107445 | Karen | Miller | 0 | 0 | 0 | 0 | 0 | 1 | 1 | 23:56 | 03:00 |
| 106744 | Amrita | Mistry | 3 | 0 | 0 | 0 | 0 | 0 | 3 | 71:49 | 00:03 |
| 104628 | Bettina | Smith | 1 | 0 | 0 | 0 | 0 | 1 | 2 | 11:50 | 14:45 |
| 107456 | Scott | Vanderspool | 3 | 1 | 0 | 0 | 0 | 0 | 4 | 55:25 | 07:48 |
| 105398 | Kathryn | Warthling | 4 | 0 | 0 | 0 | 0 | 0 | 4 | 71:40 | 00:04 |
| 105498 | Karen | Yates | 3 | 0 | 0 | 0 | 0 | 0 | 3 | 71:49 | 00:03 |
| Totals | | | 28 | 5 | 0 | 0 | 0 | 5 | 38 | 602:41 | 65:39 |

The rightmost 2 columns represent a notional 'time lost' due to the infringement. The 'Time' column is the difference between the actual time the clocking occurred and the time it should have occurred. The 'Rounded' column uses the Rounded time rather than the actual time. Thus, assuming, for example, the following:

Shift Start Time 07:00

Actual clock IN time 07:04

Rounding Rules, 3 minutes Grace, 15 minutes Increment (07:15 Rounded IN time)

then the Time column would read 00:04 (actual time lost) and the Rounded column would read 00:15 (Rounded Time lost).

Three reports types can be selected from the  'Report' button. You can chose either textual, graphic (where the values are represented by a bar) or a combination of the two.

5.12 Lateness

Reports menu - Lateness

The Lateness Report produces a detailed analysis, by employee, of late arrival at the start of a shift. It details each occurrence, giving Date, planned Start Time, Actual Start Time, and Time Lost through lateness.

| Lateness (Outside Grace Time) | | | | | | |
|---|------------|-----------|------------|--------------|-------------|-----------|
| Mon 14 May 2007 to Sun 20 May 2007 (1 Week) | | | | | | |
| All Employees | | | | | | |
| Number | First Name | Last Name | Date | Planned Time | Actual Time | Lost Time |
| 102874 | Susan | Atken | 14/05/2007 | 08:00 | 08:07 | 00:07 |
| | | | 18/05/2007 | 08:00 | 08:09 | 00:09 |
| | | | | | | 00:16 |
| 104772 | Jayna | Almari | 14/05/2007 | 08:00 | 08:09 | 00:09 |
| | | | 16/05/2007 | 08:00 | 08:12 | 00:12 |
| | | | | | | 00:21 |
| 103846 | Theresa | Diamond | 15/05/2007 | 16:00 | 16:07 | 00:07 |
| | | | 17/05/2007 | 16:00 | 16:06 | 00:06 |
| | | | | | | 00:13 |
| | | | | | | 00:50 |

Two formats are available:

Lateness Outside Grace includes only those occurrences where the employee arrives after the grace time, creating a 'Late IN' infringement on the timesheet. The time lost is effectively the amount of time for which employees will not be paid.

Lateness Within Grace lists clockings where employees have arrived late, but not late enough to create an infringement. The time lost in this case is the time paid to employees which has not been worked.

5.13 Absences

Reports menu - Absences

The Absence Report provides a simple list of the number of absences per employee over a given period of time.

5.14 Absence Periods

Reports menu - Absence Periods

The Absence Period Report lists absences by employee for a certain Absence Reason or Absence Type.

| | | | Start | End | Calendar Days | Work Days |
|--------|----------|----------|------------|------------|---------------|-----------|
| 107345 | Virginia | Ackerman | 30/01/2006 | 07/02/2006 | 9 | 3 |
| 102466 | Timothy | O'Hara | 09/02/2006 | 10/02/2006 | 2 | 2 |
| | | | 05/04/2006 | 13/04/2006 | 9 | 5 |
| 106862 | Mark | Stanford | 04/04/2006 | 07/04/2006 | 4 | 4 |
| | | | | | 24 | 14 |

Examples of Absence Types are Sick Paid, Sick Unpaid, Public Holiday etc. as listed in the Absence definition screen.

An absence period will start and end with the reason or type you have requested. The period is terminated by either a day when the employee clocks, or a day when a different absence reason or type is booked.

When you define more than one Absence Reason within an Absence Type, e.g. Sick - Bad Back and Sick - Flu, both within the Sick Paid absence type and you create a report for Absence Type Sick Paid, you will get a combination of both sickness reasons on the report. If a sickness period starts with a Bad Back and ends with Flu, the period will be reported as one occasion of absence of Type Sick Paid. You will need to request the report for the individual Sick Reasons if you need more resolution on the data.

5.15 Flexitime Balance

Reports menu - Flexitime Balance

The Flexitime Balance Report shows how the Flexitime Balance varies over time.

| Flex Variance | | | | | | | | | | | | | |
|---|----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|----------|---------|
| Flexitime Group 'Quarterly' for 10 weeks from 02/01/2006 Sorted by Last Name | | | | | | | | | | | | | |
| | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Variance | Balance |
| | | 02-Jan | 09-Jan | 16-Jan | 23-Jan | 30-Jan | 06-Feb | 13-Feb | 20-Feb | 27-Feb | 06-Mar | | |
| 102874 | S. Aitken | -06:15 | -10:45 | -15:15 | -09:15 | -08:30 | -05:00 | 00:45 | 26:45 | 35:00 | 35:00 | 42:30 | 82:30 |
| 102997 | M. Broadhurst | 01:45 | -11:25 | -09:35 | -11:35 | -09:30 | -02:45 | -09:05 | 35:00 | 35:00 | 35:00 | 52:50 | 92:50 |
| 103846 | T. Diamond | -08:30 | -15:10 | -05:45 | -15:45 | -17:15 | 00:00 | -22:00 | -03:45 | 35:00 | 35:00 | -18:10 | 21:50 |
| 108347 | E. Gillespie | -16:50 | -17:15 | -01:30 | -11:35 | -06:45 | -23:45 | -03:45 | -12:05 | 35:00 | 35:00 | -23:30 | 16:30 |
| 105624 | B. Palmer | -07:30 | -23:05 | -15:30 | -06:00 | -25:00 | -05:45 | -03:00 | -10:35 | 35:00 | 35:00 | -26:25 | 13:35 |
| 105972 | K. Roberts-Horsfield | -04:45 | -23:50 | -01:15 | -03:00 | -11:35 | -21:00 | -13:00 | 01:30 | 35:00 | 35:00 | -06:55 | 33:05 |

The report above shows the weekly flexitime balance variation over time as well as the total over the period (Variance column) which is the sum of all the weekly columns. The Balance column is the result of adding any initial starting balance, in this case 40:00 hours.

5.16 Flexitime Period

Reports menu - Flexitime Period

The Flexitime Period Report shows the Flexitime Balance at the end of a period. The Summary lists all employees in a Flexitime Group.

| Flex Period Summary | | | | | | | | | |
|-----------------------------------|----------|------------|-------|-------|-------|-------|-------|-------|-------------------------|
| Mon 02 Jan 2006 - Sun 15 Jan 2006 | | | | | | | | | |
| Number | Name | | Rate1 | Rate2 | Rate3 | Rate4 | Rate5 | Rate6 | Balance Brought Forward |
| 107345 | Virginia | Ackermane | 72:30 | | | | | | 70:00 |
| 102997 | Megan | Broadhurst | 79:40 | | | | | | 70:00 |
| 103846 | Theresa | Diamond | 93:40 | | | | | | 70:00 |
| | | | | | | | | | 02:30 |
| | | | | | | | | | 09:40 |
| | | | | | | | | | 23:40 |

The Detail Report shows the daily calculations that go to make up the end of Period results for each employee in the group. An analysis of the Period as a whole is produced as well as the Annual Leave summary.

| Flex Period Detail | | | | | | | | | |
|-----------------------------------|-------|-------|-------|-------|------------------------|------------|--------|--------|---------|
| Mon 02 Jan 2006 - Sun 15 Jan 2006 | | | | | | | | | |
| 107345 Virginia Ackermane | | | | | | | | | |
| Date | IN | OUT | IN | OUT | Shift | Rate1 | Deduct | Daily | Balance |
| | | | | | | | | | 00:00 |
| Mon 02 Jan 2006 | 08:50 | 12:57 | 14:00 | 20:10 | FX1 | 08:35 | 07:30 | 01:05 | 01:05 |
| Tue 03 Jan 2006 | 08:51 | 12:56 | 13:56 | 17:27 | FX1 | 07:55 | 07:30 | 00:25 | 01:30 |
| Wed 04 Jan 2006 | 08:55 | 12:58 | 13:58 | 17:34 | FX1 | 08:00 | 07:30 | 00:30 | 02:00 |
| Thu 05 Jan 2006 | 08:57 | 12:58 | 13:56 | 17:29 | FX1 | 07:50 | 07:30 | 00:20 | 02:20 |
| Fri 06 Jan 2006 | 08:52 | 12:58 | 14:01 | 17:26 | FX2 | 07:50 | 05:00 | 02:50 | 05:10 |
| Sat 07 Jan 2006 | | | | | | | 00:00 | 00:00 | 05:10 |
| Sun 08 Jan 2006 | | | | | | | 00:00 | 00:00 | 05:10 |
| Mon 09 Jan 2006 | 08:53 | 13:04 | 13:57 | 17:28 | FX1 | 08:00 | 07:30 | 00:30 | 05:40 |
| Tue 10 Jan 2006 | 08:50 | 13:01 | 14:01 | 17:25 | FX1 | 08:00 | 07:30 | 00:30 | 06:10 |
| Wed 11 Jan 2006 | 08:53 | 13:04 | 14:03 | 20:27 | FX1 | 08:30 | 07:30 | 01:00 | 07:10 |
| Thu 12 Jan 2006 | 08:53 | 13:00 | 14:00 | 17:28 | FX1 | 00:00 | 07:30 | -07:30 | -00:20 |
| Fri 13 Jan 2006 | 08:57 | 12:55 | 13:57 | 17:25 | FX2 | 07:50 | 05:00 | 02:50 | 02:30 |
| Sat 14 Jan 2006 | | | | | | | 00:00 | 00:00 | 02:30 |
| Sun 15 Jan 2006 | | | | | | | 00:00 | 00:00 | 02:30 |
| | | | | | | 72:30 | 70:00 | 02:30 | |
| Flex Period Summary | | | | | Annual Leave Summary | | | | |
| Contracted Hours this Period: | 70:00 | | | | Holiday Start Date: | 01/01/2006 | | | |
| Basic Hours this Period: | 72:30 | | | | Annual Entitlement: | 20 | | | |
| Variance this Period: | 02:30 | | | | Leave Brought Forward: | 20 | | | |
| Balance from Previous Period: | 00:00 | | | | Leave Taken in Period: | 0 | | | |
| Hours Carried Forward: | 02:30 | | | | Leave Carried Forward: | 20 | | | |

5.17 Clockings

Reports menu - Clockings

The Clockings Report generates a list of previous clocking records, selected by Group and Date Range.

Events recorded will fall into the following types:

- Clock IN
- Clock OUT
- Access attempt Accepted (Door 1 and 2)
- Access attempt Denied (Door 1 and 2)
- Door Ajar Set and Clear (Door 1 and 2)
- Door Forced Set and Clear (Door 1 and 2)
- Anti-Passback Deny (Door 1 and 2)


Records can be sorted by type and date/time.

5.18 Who's In

Reports menu - Who's In

| Who's In | | | | |
|---|------------|-----------|-------|---------------------|
| Employees clocked in on Mon 02 Jan 2006 at 21:46 | | | | |
| All Employees Ordered by Clocked In Time | | | | |
| Number | First Name | Last Name | Clock | Time |
| 103374 | Thomas | Mahoney | 255 | 02/01/2006 20:55:44 |
| 107445 | Karen | Miller | 255 | 02/01/2006 20:55:52 |
| 105398 | Kathryn | Werthing | 255 | 02/01/2006 20:59:33 |
| 105624 | Bruce | Palmer | 255 | 02/01/2006 21:00:15 |
| 103846 | Theresa | Diamond | 255 | 02/01/2006 21:00:44 |
| 102884 | Jack | Campbell | 255 | 02/01/2006 21:01:58 |
| 104628 | Bettina | Smith | 255 | 02/01/2006 21:02:08 |
| 107677 | Rahul | Kohli | 255 | 02/01/2006 21:03:08 |

This report shows a list all employees clocked IN at a certain time and date. Sorting can be carried out on any column.

If the current time and date is selected by clicking the  Now button, the report is effectively a representation of the Watch screen.

6 Schedules

The system records employee clocking times and calculates the hours to pay based on the rules you supply.

The **Daily Rule** forms the basis for this calculation and describes how you want to apply breaks, overtime and rounding calculations for a particular day's clockings. You can design as many different Daily Rules as you need. For instance, you would have one Daily Rule for a 8AM to 5PM working day and another for an 8AM to 12AM day.

Daily Rules are then combined into a **Work Schedule** or a **Rota**. A Work Schedule describes a pattern of Daily Rules that repeats over time, usually over a period of a week but the period can be set to any number of days. The Rota allows you to set up each employee's future Daily Rule for any day by comparison with other members of a Group.

You can also specify **Weekly Rules** to apply at the end of a week specifically to adjust Overtime calculations on a weekly basis.

6.1 Daily Rules

Schedules menu - Daily Rules

You can specify as many different Daily Rules as you need. Each rule has a short code which appears against each day's clockings on an employee's timesheet. The Name is any free text you desire, but you will find it useful if you include the Start and End times. This text appears in the Timesheet status window when you hover the mouse pointer over the Daily Rule short code.

| WKS2 08:00 to 17:00 | | | |
|---------------------|---------------------|------------|----------|
| Short Code | Name | Start Time | End Time |
| WKS2 | WKS2 08:00 to 17:00 | 08:00 | 17:00 |

The Start and End times are the normal shift times before any overtime is worked and are used to generate clocking Infringements for Late In and Early Out. If you do not want the Daily Rule to register this type of Infringement, set the Start Time to 00:00 and the End Time to 24:00.

6.1.1 General Tab

Schedules menu - Daily Rules - General Tab

Standard Hours: If you are using the Rota to schedule employees to Daily Rules, the Standard Hours parameter is used in calculating the Cost of Hours you are allocating. This is multiplied by the employee's Hourly Rate and used in the Cost Variance report which compares planned cost with actual cost.

Flex Deduct Hours: If the employee is allocated to a Flexitime Group this is the contracted hours for this Daily Rule. If the employee does not work flexitime, this parameter can be ignored.

Shifts over Midnight: For any shift, but particularly relevant to shifts that span midnight, you can elect to pay the hours on the first day or the second day.

Exclude Break Clockings: Causes FOCUS to ignore all clocking's other than the First IN and Last OUT.

Cost Centre: If you have set up Cost Centres in the [System Setup | Cost Centre](#) tab, you can allocate a Daily Rule to a Cost Centre.

Auto Allocate: When you design an employee's [Work Schedule](#) you can specify several Daily Rules that could be worked on a day. For instance, a shift worker may work 08:00-16:00, 16:00-24:00, or 00:00-08:00. In this case you would programme all 3 Daily Rules for each working day and let the system automatically allocate one of the 3 Daily Rules depending on when the employee clocks in. In the example above, if the employee clock IN between 07:00 and 09:00 he/she will be put onto this shift. If several Daily Rules are set up with overlapping Auto Allocate bands, the system chooses the one with the nearest clocking time to the normal shift start. If no Daily Rules can be allocated, the system will use the Default Daily Rule.

Auto Clock Out: Selecting this option allows the employee to clock onto a Daily Rule and have the system automatically clock him/her out. In operation, if the employee is still clocked IN at a time

equivalent to the Normal Shift End plus the Maximum Overtime allowed at the end of the shift, the system will mark him/her as clocking out at the Normal Shift End.

Daily Rule Details: This is a free text memo field that is initialised with the date the rule was created and by whom. You can use it to record reasons and dates of changes.

Open Shifts: If you wish to 'pay by the hour' i.e. not have a fixed Start and End Time, set the Start Time to 00:00 and the End Time to 24:00.

6.1.2 Overtime-1 Tab

Schedules menu - Daily Rules - Overtime-1 Tab

Focus gives you up to 8 time bands for a 24 hour period and lets you specify the rates of pay (1 to 6) for each of the time bands. You can also specify a minimum time that must be worked to accrue any hours in that band.

You can specify bands in any order although you will find it easier to read the rules if you keep the bands in time order. Focus will not allow you to programme overlapping time bands. Hours worked at times that are not programmed will not be paid.

WKS2 08:00 to 17:00

Short Code: WKS2 Name: WKS2 08:00 to 17:00 Start Time: 08:00 End Time: 17:00

| From | To | Rate | Min |
|-------|-------|------|-------|
| 07:00 | 08:00 | 1 | 00:15 |
| 08:00 | 17:00 | 1 | 00:00 |
| 17:00 | 19:00 | 2 | 00:30 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |

General **Overtime-1** Overtime-2

Rounding Break Band Break After Bonus Exceptions

In the example above, the shift pays at Rate 1 from 08:00 to 17:00.

Time worked before the shift is also paid at Rate 1 but is limited to 1 hour (07:00 to 08:00) and will not be paid if less than 15 minutes are accrued.

Time worked after the shift ends will be paid at Rate 2 up to a maximum of 2 hours and must be at least 30 minutes in duration.

6.1.3 Overtime-2 Tab

Schedules menu - Daily Rules - Overtime-2 Tab

| WKS1 00:00 to 09:00 | | | |
|---|---------------------|---------------|----------|
| Short Code | Name | Start Time | End Time |
| WKS1 | WKS1 00:00 to 09:00 | 00:00 | 09:00 |
| Overflow Hours | | | |
| Rate 1 after | 08:00 | flows to Rate | 2 |
| Rate 2 after | 02:00 | flows to Rate | 0 |
| Rate 3 after | 00:00 | flows to Rate | 0 |
| Rate 4 after | 00:00 | flows to Rate | 0 |
| Rate 5 after | 00:00 | flows to Rate | 0 |
| Rate 6 after | 00:00 | flows to Rate | 0 |
| General Overtime-1 Overtime-2 Rounding Break Band Break After Bonus Exceptions | | | |

Use Overtime-2 to programme the system to allocate overtime to hours worked after a set number of hours, rather than at set times of the day.

The example shows how you would set up a shift to pay the first 8 hours at rate 1, then up to 2 more hours at rate 2.

Overtime-2 can be used in conjunction with Overtime-1, with Overtime-1 being calculated first.

NB: When you create a new Daily Rule, Overtime-2 will be set up with rate 1 flowing to rate 1, Rate 2 to Rate 2 etc, which causes Overtime-2 to have no effect. Be aware that when you clone a Daily Rule, the Overtime-2 settings will be copied from the old rule to the new rule, so you may need to check and adjust the settings.

6.1.4 Rounding Tab

Schedules menu - Daily Rules - Rounding Tab

WKS2 08:00 to 17:00

Short Code: WKS2 Name: WKS2 08:00 to 17:00 Start Time: 08:00 End Time: 17:00

IN Times Rounding

| From | To | allow | minutes late arrive before applying | minutes rounding | Double Deduct |
|-------|-------|-------|-------------------------------------|------------------|-------------------------------------|
| 00:00 | 08:00 | 05 | 15 | | <input type="checkbox"/> |
| 08:00 | 08:30 | 05 | 15 | | <input checked="" type="checkbox"/> |
| 09:00 | 24:00 | 00 | 00 | | <input type="checkbox"/> |
| 00:00 | 00:00 | 00 | 00 | | <input type="checkbox"/> |

OUT Times Rounding

| From | To | allow | minutes early leaving before applying | minutes rounding |
|-------|-------|-------|---------------------------------------|------------------|
| 00:00 | 24:00 | 05 | 15 | |
| 00:00 | 00:00 | 00 | 00 | |
| 00:00 | 00:00 | 00 | 00 | |
| 00:00 | 00:00 | 00 | 00 | |

Rounding Break Band Break After Bonus Exceptions

General Overtime-1 Overtime-2

When an employee clocks IN, he/she is allowed to be late by the number of 'Grace' minutes (you can set this to zero). If this Grace Time is exceeded the employee is deemed late and the IN time is adjusted forward to the nearest Increment time.

In a similar way, Grace Out allows an employee to clock OUT a few minutes early before docking extra time for early departure.

For example, if the Grace IN time is set to 3 (minutes) and the Increment IN is set to 15 (minutes):

Clock IN at 09:03 will be adjusted back to 09:00 (3 minutes late arrival allowed).

Clock IN at 09:04 will be adjusted forward to 09:15 (11 minutes deducted for excessive late arrival).

Clock IN at 08:55 will be adjusted forward to 09:00 (In time 'rounded' to quarter of an hour)

Similarly, if Grace OUT is set to 5 (minutes) and Increment OUT is set to 10 (minutes):

Clock OUT at 16:55 will be adjusted to 17:00 (up to 5 minutes leaving early allowed).

Clock OUT at 16:54 will be adjusted to 16:50 (10 minutes deducted for excessive early leaving).

Clock OUT at 17:03 will be adjusted to 17:00 (OUT time 'rounded' to ten minutes)

If you do not want to allow any Grace time, set Grace to 0.

If you do not want to apply rounding, set the Increment to 0.

Double Deduct: If you tick the 'Double Deduct' box, the employee is doubly penalised for being late during the time band. Not only is the IN clocking rounded but the number of minutes late is also deducted. For instance, with 3 minutes Grace and 15 minutes Rounding the following results will be achieved with 'Double Deduct':

09:02 rounds to 09:00
 09:04 rounds to 09:19
 09:10 rounds to 09:25

It follows that you will need to ensure Double Deduct is turned off in the period before the Normal Start Time.

The Rounding is set up as a part of each Daily Rule. You can set up to 4 time bands per day for IN and OUT times to allow different rules around normal Start and Finish times and break times. Any times not included in a Rounding Band are not subject to Rounding. Don't forget you can 'Clone' Daily Rules so you don't have to set up every parameter whenever you create a new rule.

When you hover the mouse pointer over a time on the timesheet, the tool tip text indicates the rounding rules applied (if any).

6.1.5 Break Band Tab

Schedules menu - Daily Rules - Break Band Tab

WKS2 08:00 to 17:00

| Short Code | Name | Start Time | End Time |
|------------|---------------------|------------|----------|
| WKS2 | WKS2 08:00 to 17:00 | 08:00 | 17:00 |

| Break Band 1 | |
|--------------------------------------|---|
| From 12:30 to 13:00 | allow 00:30 at Rate 1 Grace 00 |
| Penalty break for not clocking 00:00 | Only apply if IN at time: 00:00 Paid Round 00 |

| Break Band 2 | |
|--------------------------------------|---|
| From 10:00 to 10:20 | allow 00:10 at Rate 1 Grace 03 |
| Penalty break for not clocking 00:00 | Only apply if IN at time: 00:00 Paid Round 10 |

| Break Band 3 | |
|--------------------------------------|---|
| From 00:00 to 00:00 | allow 00:00 at Rate 1 Grace 00 |
| Penalty break for not clocking 00:00 | Only apply if IN at time: 00:00 Paid Round 00 |

| Break Band 4 | |
|--------------------------------------|---|
| From 00:00 to 00:00 | allow 00:00 at Rate 1 Grace 00 |
| Penalty break for not clocking 00:00 | Only apply if IN at time: 00:00 Paid Round 00 |

| Break Band | Break After | Bonus | Exceptions |
|------------|-------------|------------|------------|
| General | Overtime-1 | Overtime-2 | Rounding |

Break Band Disable: A Break Band has no effect if the 'From' and 'To' times are the same (e.g. Break

Band 2-4 above).

Break Band Rate: If the Break Band lies wholly within a programmed Rate Band as defined by Overtime-1, the system deducts the break at the prevailing rate. In the case where a Break Band overlaps 2 Rate Bands, you can specify at which Rate to deduct the Break.

Penalty Break: If a Break Band is set up, Paid or Unpaid, and no clocking takes place in the break band then the system deducts the Penalty Break. This can be switched off by making the Penalty break time "00:00".

Break Infringements: Infringements are created when an employee clocks OUT Before or IN After a Break Band or takes too long a break (Break Overrun).

Conditional Break: You can make the break be conditional upon the employee being clocked IN at a certain time.

Break Rounding: By Using the Grace and Round parameters, which are both in Minutes, you can round the actual break taken. For example, using the 3 minutes Grace and 10 minute rounding as in the example (Break Band 2), the following results would be calculated:

| Break (mins) | Deducted (mins) |
|--------------|-----------------|
| up to 10 | 10 |
| 11 | 10 |
| 12 | 10 |
| 13 | 10 |
| 14 | 20 |

Note that the break rounding uses the Rounded Times that are prevalent at the time, so you will need to set up the Rounding Bands to suit.

6.1.6 Break After Tab

Schedules menu - Daily Rules - Break After Tab

M2 10:00-18:00

| | | | |
|------------|----------------|------------|----------|
| Short Code | Name | Start Time | End Time |
| M2 | M2 10:00-18:00 | 10:00 | 18:00 |

Break After 1

After at Rate deduct

Break Clocked ☒ Deduct longer of 'Allowed' and 'Clocked'

Allowed Break ☐ Deduct 'Allowed' as well as 'Clocked'

☐ Deduct 'Clocked'

Break After 2

After at Rate deduct

Break Clocked ☒ Deduct longer of 'Allowed' and 'Clocked'

Allowed Break ☐ Deduct 'Allowed' as well as 'Clocked'

☐ Deduct 'Clocked'

Break After 3

After at Rate deduct

Break Clocked ☒ Deduct longer of 'Allowed' and 'Clocked'

Allowed Break ☐ Deduct 'Allowed' as well as 'Clocked'

☐ Deduct 'Clocked'

Break After 4

After at Rate deduct

Break Clocked ☒ Deduct longer of 'Allowed' and 'Clocked'

Allowed Break ☐ Deduct 'Allowed' as well as 'Clocked'

☐ Deduct 'Clocked'

[Break After](#) / [Bonus](#) / [Exceptions](#)
[General](#) / [Overtime-1](#) / [Overtime-2](#) / [Rounding](#) / [Break Band](#)

Where employees breaks do not fall into precisely defined time bands it may be impossible to use Break Bands. In this case Focus can apply Break rules **after** the employee has worked a certain amount of time.

Focus provides for four breaks, each with several options which allow you to specify how the breaks will be applied. This feature can be used in conjunction with the Break Bands. Break Band calculations are applied first, followed by the Break After rules.

Disable this feature by setting the 'Deduct at Rate' to 0 (default)

If the employee does not take a break in the specified period a Penalty Break is deducted. In the example above, after 6 Hours, if the employee has not taken a break, 20 minutes is deducted. The deduction is made gradually after the 06:00. With the setting above, the following timesheet is produced.

| In | Out | In | Out | Rate 1 |
|-------|-------|----|-----|--------|
| | | | | x01.00 |
| 08:00 | 13:40 | | | 05:40 |
| 08:00 | 13:55 | | | 05:55 |
| 08:00 | 14:10 | | | 06:00 |
| 08:00 | 14:19 | | | 06:00 |
| 08:00 | 14:25 | | | 06:05 |

So the employee accumulates time up to 06:00, then the next 00:20 is not paid, and after 06:20, time is again accumulated.

If the employee does clock for a break, there are 3 options you can select, depicted under 'Break Clocked'.

Deduct Longer of 'Allowed' and 'Clocked'

This deducts any break that the employee clocks. If this is not as long as the Break Allowed then the total 'Break Allowed' is deducted. Note that when the Break Allowed is deducted it is done so progressively as in the case of the Penalty Break.

Deduct 'Allowed' as well as 'Clocked'

In this case, the employee is not expected to clock for a break, so the Break Allowed will be added to any break that the employee clocks.

Deduct 'Clocked'

This has the effect of not applying a Break and pays the employee the hours worked. Note that the penalty Break still applies if the employee does not take a break.

6.1.7 Bonus Tab

Schedules menu - Daily Rules - Bonus Tab

| Short Code | Name | Start Time | End Time |
|------------|----------------|------------|----------|
| M2 | M2 10:00-18:00 | 10:00 | 18:00 |

| Bonus | Hours Worked | Bonus Hours | At Rate |
|---------|--------------|-------------|---------|
| Bonus 1 | 00:00 | 01:00 | 4 |
| Bonus 2 | 03:00 | 00:30 | 5 |
| Bonus 3 | 00:00 | 00:00 | 0 |
| Bonus 4 | 00:00 | 00:00 | 0 |

| Break Band | Break After | Bonus | Exceptions |
|------------|-------------|------------|------------|
| General | Overtime-1 | Overtime-2 | Rounding |

The Bonus Tab allows you to apply an Attendance or Shift Bonus when this Daily Rule is worked.

For each of the four rules the user can set a trigger point for the total hours worked on the shift before

the Bonus is paid. Then the Bonus is paid as a number of hours at one of the 6 rates of pay.

To set an Attendance Bonus, where time is given for working on the shift, set the 'Hours Worked' to 00:00.

6.1.8 Exceptions Tab

Schedules menu - Daily Rules - Exceptions Tab

The Exceptions Tab is where you can customise how FOCUS generates an Exception on hours worked above or below the expected level.

WKS2 08:00 to 17:00

Short Code: Name: Start Time: End Time:

Create exceptions for these events

| | Condition | Time | Rate |
|--|-----------|-------|------|
| <input checked="" type="checkbox"/> Target Hours 1 | Less Than | 07:00 | Any |
| <input checked="" type="checkbox"/> Target Hours 2 | More Than | 00:30 | 2 |
| <input type="checkbox"/> Target Hours 3 | Less Than | 00:00 | Any |
| <input type="checkbox"/> Target Hours 4 | Less Than | 00:00 | Any |

Break Band Break After Bonus **Exceptions** General Overtime-1 Overtime-2 Rounding

6.2 Work Schedules

Schedules menu - Work Schedules

Works 3 Shift System

Short Code: Name: Days:

| | Schedule A | Schedule B | Schedule C | Schedule D | Schedule E |
|-----------|---------------------|---------------------|---------------------|---------------|------------|
| Monday | WKS1 00:00 to 09:00 | WKS2 08:00 to 17:00 | WKS3 16:00 to 01:00 | | |
| Tuesday | WKS1 00:00 to 09:00 | WKS2 08:00 to 17:00 | WKS3 16:00 to 01:00 | | |
| Wednesday | WKS1 00:00 to 09:00 | WKS2 08:00 to 17:00 | WKS3 16:00 to 01:00 | | |
| Thursday | WKS1 00:00 to 09:00 | WKS2 08:00 to 17:00 | WKS3 16:00 to 01:00 | | |
| Friday | WKS1 00:00 to 09:00 | WKS2 08:00 to 17:00 | WKS3 16:00 to 01:00 | | |
| Saturday | | | | Works Weekend | |
| Sunday | | | | Works Weekend | |

Work Schedule Description

24 hour working in 3 shifts of 9 hours with 1 hour overlap
 00:00 to 09:00
 09:00 to 17:00
 16:00 to 01:00

Each Employee can be allocated to a Work Schedule on the Rules Tab of the Employee screen.

The Work Schedule allows you to specify how Daily Rules are combined. You can specify a choice from 5 Daily Rules per day (only 3 shown in the image above). In the example, if an employee clocks around 08:00 on Monday, they will be put onto the '08:00 to 17:00 Works A' shift. If they clock around 16:00, they will be Automatically Allocated to the '16:00 to 25:00' shift. Allocating an employee to a shift means that the rules for that shift (rounding, breaks, overtime etc.) are applied to that set of clockings.

If an employee is scheduled for any shift in the column 'Schedule A', they are scheduled to work that day, and if they do not clock in they are marked as Absent by the system. If they can optionally work on a day, put them in columns other than the first Schedule column. In the example, the employee is not expected to work on Sunday, but if they do clock IN the system will try to allocate them to the daily Rule '08:00 to 12:00'.

To clear an employee's Daily Rule, select the Default Rule from the drop down list.

If the system can't match a clock IN time to a Daily Rule it will put the employee onto the Default Daily Rule.

If an employee is not allocated to a Work Schedule or a Rota, they will be put on the Default Daily Rule when they clock.

Rotating Shifts: In the example, a 7 day schedule is specified, i.e. weekly. But you can choose any number of days (up to 56) for the pattern to repeat. If you pick a cycle other than 7 days, you will be prompted for a date for the pattern to start.

6.3 Weekly Rules

Schedules menu - Weekly Rules

Weekly Rules are adjustments to overtime worked at the end of each week.

Weekly Limit: allows you to pay at a higher rate after a set number hours have been worked in the week.

Weekly Clawback: ensures overtime is not paid until an employee has accrued a minimum number of hours at a lower rate.

Both of these features can be turned off by unchecking the relevant boxes.

Weekly Rule Details: This is a free text memo field that is initialised with the date the rule was created and by whom. You can use it to record reasons and dates of changes.

6.4 Rota

Schedules menu - Rota



Rota

Shortcut Button

Use the Rota option if your employees' hours of work do not fit regular repeating patterns. Select a Group of employees and schedule the daily Rules they will be working on a given day. The Timesheet then applies these rules to the clocked times. Scheduling employees using the Rota also allows you to analyse planned costs against actual costs using the [Cost Variance](#) report.

| Maintenance - Mon 06 Feb 2006 | | | | | | | | | |
|-------------------------------|------------------|------------------|------------------|----------------|----------------|------------|------------|-------|--------|
| | Mon 06 Feb | Tue 07 Feb | Wed 08 Feb | Thu 09 Feb | Fri 10 Feb | Sat 11 Feb | Sun 12 Feb | Hours | Cost |
| Michael Chauvin | | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | | | 16:00 | 96.00 |
| Timothy O'Hara | Holiday | Holiday | Holiday | Sick Unpaid | Sick Unpaid | | | 00:00 | 0.00 |
| Alex Varia | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | | | | 15:00 | 75.00 |
| | | | | | | | | | |
| Day Hours | 05:00 | 09:00 | 09:00 | 04:00 | 04:00 | 00:00 | 00:00 | 31:00 | |
| Day Cost | 25.00 | 49.00 | 49.00 | 24.00 | 24.00 | 0.00 | 0.00 | | 171.00 |

Rotaed Daily Hours: The Rota calculates the hours you are scheduling for each day and for each employee. This is based on the Standard Hours parameter from the Daily Rule.

Rotaed Daily Cost: Monetary values are calculated as the product of hours worked and basic rate of pay. Monetary values are only visible if enabled in the User Setup screen (Pay option).

Absences: Absences show on the Rota highlighted in the colour from the Absence definition. These **cannot be edited** on the Rota.

Daily Rules that have been rotaed for an employee while they are working in another group will be highlighted in this group in Grey.

Include Costs: Select this option if you wish to view monetary values on the Rota screen and the reports.

Include Absences: Tick this box if you wish to include absence hours and their costs on the Rota calculations.

If you selected Rota Quantities on [System Setup General tab](#) you will see 3 extra rows at the bottom of the rota screen:

| Maintenance - 06 Feb 2006 | | | | | | | | | |
|---------------------------|------------------|------------------|------------------|----------------|----------------|------------|------------|-------|--------|
| | Mon 06 Feb | Tue 07 Feb | Wed 08 Feb | Thu 09 Feb | Fri 10 Feb | Sat 11 Feb | Sun 12 Feb | Hours | Cost |
| Michael Chauvin | | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | | | 16:00 | 200.00 |
| Timothy O'Hara | Holiday | Holiday | Holiday | Sick Unpaid | Sick Unpaid | | | | |
| Alex Varia | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | | | | 15:00 | 75.00 |
| | | | | | | | | | |
| Day Hours | 05:00 | 09:00 | 09:00 | 04:00 | 04:00 | | | 31:00 | |
| Day Cost | 25.00 | 75.00 | 75.00 | 50.00 | 50.00 | | | | 275.00 |
| Quantity | 6 | 12 | 11 | 6 | 5 | | | | |
| Items per Hour | 1.20 | 1.33 | 1.22 | 1.50 | 1.25 | | | | |
| Cost per Item | 4.17 | 6.25 | 6.82 | 8.33 | 10.00 | | | | |

You can enter the Quantity manufactured or processed each day and Focus will calculate for you the number of Items per Hour and their Cost.

6.4.1 Rota Editing - Fixed Daily Rules

To change a Daily Rule in a Rota, left click on the cell you want to edit. You will be presented with a list of recently used Daily Rules. Select the one you want if it is in the list or click on 'more..' to show the full list of rules. Alternatively, you can 'Drag and Drop' the daily Rule you require from the list of Daily Rules on the left hand side onto the Rota.

To Delete a daily rule from the Rota, left click on the cell and select the topmost (empty) rule.

If an employee is scheduled to work on another Rota, the cell will be occupied by a 'greyed' Daily Rule, and the tool tip will indicate which Rota they are scheduled to work

| Maintenance - Mon 02 Jan 2006 | | | | | | | |
|-------------------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------|
| | Mon 02 Jan | Tue 03 Jan | Wed 04 Jan | Thu 05 Jan | Fri 06 Jan | Sat 07 Jan | Sun 08 Jan |
| Michael Chauvin | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M4 19:00 - 23:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | |
| Neal Johnson | | | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | | |
| Timothy O'Hara | | | | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | |
| Alex Varia | M2 10:00-14:00 | M2 10:00-14:00 | M3 14:00 - 19:00 | M1 05:00 - 10:00 | | | |
| Day Hours | 09:00 | 09:00 | 04:00 | 23:00 | 17:00 | 05:00 | |

In the screen shot above, the Rota for the maintenance staff is showing Michael Chauvin rotaed to work on Security on Wednesday. This cell can be edited to delete him from the Security rota and put him onto Maintenance, if desired.

The cells with the red indicators have multiple Daily Rules or Absences scheduled into them. Hover the mouse over a cell to reveal the list of activities scheduled for that day. In the example below, the employee is scheduled for 2 Daily Rules as well as a period of absence on Company service.

| | | | | | | | | |
|------------------|------------------|------------------|------------------|------------------|------------------|------|-------|------|
| M1 05:00 - 10:00 | M1 05:00 - 10:00 | M4 19:00 - 23:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | | 23:00 | 138. |
| | | M2 10:00-14:00 | M2 10:00-14:00 | M2 10:00-14:00 | | | 12:00 | 72. |
| | | | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | 19:00 | 95. |
| M2 10:00-14:00 | M2 10:00-14:00 | M3 14:00 - 19:00 | M1 05:00 - 10:00 | | | | 13:00 | 65. |
| 09:00 | 09:00 | 04:00 | M3 14:00 - 19:00 | | | | 67:00 | |
| 50.00 | 50.00 | 24.00 | Company Service | 93.00 | 25.00 | 0.00 | | 370. |

To add a Daily Rule to a cell, right click the cell, and select from the list.

6.4.2 Rota Editing - Variable Rule

As an alternative to defining Daily Rules and then calling them up on the Rota, you can define a basic rule for the employee and then just set the start and end times on the Rota.

In this case you might define a Daily Rule and call it 'Housekeeping'. You might define the rounding rules and have a paid break of, say, 30 minutes after 4 hours work. You could also define the rules for pre-shift and post-shift overtime.

Having defined the general rule to be applied for a group of employees, set the rule as the Default on the Employee form | Rules tab.

Now all you have to do is click on a cell in the Rota and type in the Start and End times of the shift, closing the cell by hitting Enter.

<

>

Maintenance - Mon 15 Sep 2008

| | Mon 15 Sep | Tue 16 Sep | Wed 17 Sep | Thu 18 Sep | Fri 19 Sep | Sat 20 Sep | Sun 21 Sep |
|-----------------|------------------|------------------|------------------|-----------------|-----------------|-----------------|------------|
| Michael Chauvin | [09:00 - 12:00] | [09:30 - 12:30] | | | | | |
| Neal Johnson | | | | [10:00 - 15:00] | [10:00 - 15:00] | [11:00 - 13:00] | |
| Timothy O'Hara | M1 05:00 - 10:00 | M1 05:00 - 10:00 | M1 05:00 - 10:00 | | | | |
| Alex Varia | [08:00 - 14:00] | [08:00 - 14:00] | [08:00 - 14:00] | [12:00 - 16:00] | [12:00 - 16:00] | | |

Overtime Rules

As an example, suppose you were to set up your default Daily Rule to Start at 09:00 and Finish at 17:00. Allow overtime at Rate 2 from 08:00 to 09:00 provided at least 00:30 is worked (pre-shift overtime rule). Set your post shift overtime to pay at Rate 3 from 17:00 to 17:30 with a minimum of 15 minutes. This is equivalent to saying the employee can work an hour before normal (requested) shift start and 30 minutes after normal shift end.

Now, you can set the Star and End times for the shift to anything you wish, say 13:00 to 19:00, and FOCUS will apply the same overtime rule relative to these Start and End times.

6.4.3 Rota Editing - Copy & Paste

As well as modifying individual cells, you can make bulk change by copying and pasting whole areas of one Rota to another or one week to another.

Highlight the area you wish to copy by dragging the left mouse from one corner to the opposite corner of the area. Alternatively click on a column header to highlight a whole column, or the left hand cell to highlight a row. Select the whole Rota by clicking the top left cell.

Then, position the mouse pointer over the highlighted area and right click to display the list of options. As well as options to Add a Daily Rule, Copy, Paste and Clear, you can also load the selected cells from the Work Schedule. This allows you to set up a group where employees who generally work the same hours on a regular basis, but you want the flexibility and visibility of the Rota to modify shifts on a frequent basis.

6.5 Flexitime Period Rules

Schedules menu - Flexitime Period Rules

Focus implements any number of Flexitime strategies on the same system. Flexitime can be used alongside standard rules for overtime. Flexitime Periods can be specified as virtually any number of weeks or months.

Flexitime operates as follows:

On a daily basis Focus uses the Work Schedule to determine which Daily Rule to use. It then compares the Daily Rule's 'Flex Deduct Hours' parameter with the actual hours worked at RATE 1 to update the Flex Balance. At the beginning and end of the Flex Period it applies the rules defined within the employee's Flexitime Period.

Extra, Flexitime specific, information is shown on the [timesheet](#) when an employee works flexitime.

To understand how a Daily Rule is programmed for Flexitime, consider the following example:

Contracted hours: 07:30 hours per day

Core Times: 10:00 - 12:00, 14:00 - 16:00

Flexible Times: 07:00 - 10:00, 12:00 - 14:00, 16:00 - 18:30

Maximum Lunch Break is 2 hours, Minimum Lunch Break is 30 minutes.

Set up the Daily Rule as follows and call it FX1:

Set the Flex Deduct Hours to 07:30. This is the 'contractual' amount of time that should be worked on this daily rule.

Set the Start Time and End Time to define the Core Time:

Start Time = 10:00

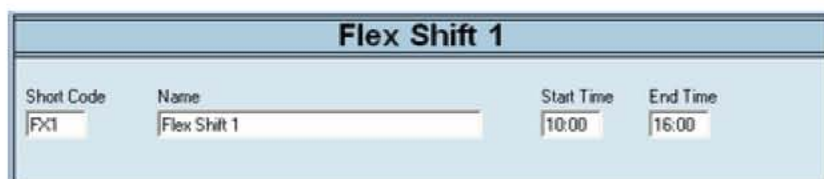
End Time = 16:00

This will cause Focus to create an infringement if the employee does not work during the core time.

On the General Tab set:

Normal Rate = Rate 1, to accrue hours worked between 10:00 and 16:00 at Rate 1.

You can set the Target Hours to cause the system to initiate a 'Target Hours (System)' exception if the employee fails to work the amount of time specified by the core time, in this case 4 hours.



| Flex Shift 1 | | | |
|--------------|--------------|------------|----------|
| Short Code | Name | Start Time | End Time |
| FX1 | Flex Shift 1 | 10:00 | 16:00 |

Next, Programme Lunch as a break of 30 minutes, unpaid, between 12:00 and 14:00.



| Break Band 1 | | | | | |
|---------------|-------|----|-------|--|--|
| From | 12:00 | to | 14:00 | allow | 00:30 |
| | | | | break | <input checked="" type="checkbox"/> Paid |
| Penalty break | 00:30 | | | <input type="checkbox"/> Only apply if IN at time: | 00:00 |

The Penalty break will subtract 30 minutes if the employee does not clock for the break.

Then, set up the flexible portions of the day before and after the core time using the Overtime 1 Tab. In this example, the employee can work from 07:00 to 10:00 and from 16:00 to 18:30. Set up the Overtime rules as follows:

Overtime Before Normal Start of Day

Min: 00:00
Max: 03:00
Rate: 1

Overtime After Normal End of Day

Min: 00:00
Max: 02:30
Rate: 1

This allows up to 3 hours before the core time and 2:30 after the core time. Specify Rate 1 to ensure the time worked counts toward flexitime.

Once you have programmed the Daily Rule(s) you build them into a Work Schedule in the usual way. Note that you can have different daily rules making up a flexitime work pattern. In the Work Schedule below different flex rules apply Monday to Thursday to those which apply on Friday. Maybe the core time is different or the Flex Target (contracted hours) is not as high. Note also that if the employee works at the weekend, another set of rules is applied that could, for instance, pay worked hours at standard overtime rates (Rate 2, Rate 3 etc.).

| Flexitime Schedule Weekdays | | | | | |
|-----------------------------|-----------------------------|------------|------------|------------|------------|
| Short Code | Name | | Days | | |
| FX1 | Flexitime Schedule Weekdays | | 7 | | |
| | Schedule A | Schedule B | Schedule C | Schedule D | Schedule E |
| Monday | Flex Shift 1 | | | | |
| Tuesday | Flex Shift 1 | | | | |
| Wednesday | Flex Shift 1 | | | | |
| Thursday | Flex Shift 1 | | | | |
| Friday | Flex Friday | | | | |
| Saturday | | | | | |
| Sunday | | | | | |

All that's left to do now is to set up the Flexitime Period Rules. These determine the length of time the period runs and starting and finishing adjustments.

Viewing a typical Flexitime Group definition:

Monthly

Name: Monthly

Description: Created: 06/07/2006 09:04 by sarah white

Period

Period repeats every: 1 Month

Start Date: 02/01/2006

Start Balance: 000.00

Positive Carry Over at Period End

Max: 005:30 Min: 000:00

Negative Carry Over at Period End

Max: 001:00 Min: 000:00

Maximum Balances During Period

Positive: 010:00 Negative: 010:00

Flex Period Advanced

In this example, the period is set for 1 Month. The period is defined as a number of Weeks or Months, a month being a calendar month. Common options are, for instance:

- 1 week
- 4 weeks
- 13 weeks (1 'quarter')
- 52 weeks (1 'year')
- 1 month
- 3 month (1 true quarter)
- 12 months (1 true year)

The start date determines the date on which one period ends and the next begins.

Start Balance: The system can be set to initialise the Flexitime Balance to a preset value at the start of the Flex Period.

Carry Over: At the end of the Flex Period the system can limit the Maximum and Minimum Positive and Negative hours balance to be carried over to the next period. In most common scenarios there is no carry over in which case all 4 parameters are set to 0 (the default for a New rule). But you can decide to allow a part of any accrued balance to be kept.

Balances During Period: Similarly, and of special relevance when the Flex Period covers a lengthy period of time, you may set the system up to maintain the Flexitime balance within set limits of Maximum Positive and Maximum Negative hours.

6.6 Flexitime Period Advanced

Schedules menu - Flexitime Period Rules

The Advanced Tab allows you to further configure the way the Flexitime Group behaves:

Column Control: You can specify which column on the Timesheet the system uses to display its calculations for Flexitime, as well as the text to be shown for the columns' headings. The **'Deduct'** column is the hours contracted to be worked for that shift for that day. The **'Balance'** column is the running Flexitime Balance, and the **'Daily'** column is the balance for the day which is the difference between Contracted Hours and Worked Hours.

Type: You can specify whether the balance is treated as hours 'owed' to the employee or as hours 'owed' to the employer. This is the difference between traditional flexitime where an increasing balance can be exchanged for time off, and a system of 'Banked Hours' where an employee owes so many hours of worked time to the employer in lieu of overtime.

You can specify which Flex information to show on the timesheet and the column position in which to show it.

6.7 Flexitime Timesheet

When an employee is allocated to a Flexitime shift the timesheet shows extra information relating to the management of flexitime.

Flexitime: Monthly. Period Start 01/01/2006

Start (01/01/2006) Balance: 00:00

End (31/01/2006) Balance: 34:50

Balance this Week :35:00

Balance From Last Week:12:30

End of Week Balance=17:05

107345 Virginia Ackermane (Schedule: Flexitime Weekdays, Weekly Rule: None)

| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | CONT | DAILY | BAL | Shift |
|----------------------|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| | | | | | x01.00 | x01.25 | x01.33 | x01.00 | x01.00 | x01.00 | |
| Mon 16 Jan | 08:55 | 12:56 | 13:59 | 17:31 | 08:00 | | | 07:30 | 00:30 | 13:00 | FX1 |
| Tue 17 Jan | 08:58 | 13:04 | 14:01 | 17:28 | 07:50 | | | 07:30 | 00:20 | 13:20 | FX1 |
| Wed 18 Jan | 08:52 | 12:59 | 14:02 | 17:33 | 07:55 | | | 07:30 | 00:25 | 13:45 | FX1 |
| Thu 19 Jan | 08:56 | 12:55 | 13:56 | 17:26 | 07:50 | | | 07:30 | 00:20 | 14:05 | FX1 |
| Fri 20 Jan | 08:51 | 13:01 | 14:00 | 17:25 | 08:00 | | | 05:00 | 03:00 | 17:05 | FX2 |
| Sat 21 Jan | 10:04 | 12:21 | | | | 02:00 | | | 00:00 | 17:05 | SWE |
| Sun 22 Jan | | | | | | | | | 00:00 | 17:05 | |
| Weekly Hours | 41:35 | | | | 39:35 | 02:00 | | 35:00 | -35:00 | | |
| Weekly Rules Applied | 41:35 | | | | 39:35 | 02:00 | | 35:00 | -35:00 | | |
| Weekly Gross Totals | 42:08 | | | | 39:58 | 2:50 | 0:00 | 35:00 | -35:00 | 0:00 | |

The example above shows a timesheet for an employee working on a Flexitime Rule which has been called 'Monthly' and has a period of 1 Calendar Month. The week shown is for 16th January, the period starts on the 1st and ends on the 31st.

The columns for rates 4, 5, and 6 have been set up in the [Flexitime Period Rule](#) for 'CONT' (Contractual), 'DAILY' (Daily Balance) and 'BAL' (running period balance).

Considering the hours for Tuesday: Hours worked is 07:50. Hours Contracted is 07:30 so the Daily Balance is 00:20. Added to the previous day's Period Balance of 13:00 becomes 13:20.

Note that the schedule being used is 'Flexitime Weekdays' which specifies a different rule on Friday (FX2) when the employee is contracted to work less hours. Also overtime worked at the weekend is accumulated at rate 2 and does not affect the flexi balance.

The information above the timesheet analyses the figures for the flex period (left hand side) and the flex week (right hand side)

6.8 Shifts over Midnight

Timesheet Depiction of Clockings over Midnight

The Timesheet shows clocking times groups together into shifts, with total hours calculated for the shift on the same row. This helps to understand how the times make up the hours. The timesheet displays clockings for the 7 days of the week, starting with whichever day you have set as your Week Start Date. The problem with shifts over midnight is that they span 2 days of the week, so the question that arises is which day of the week to put the times and totals against - is it the first day or the second day? The answer is that you have a choice and you can set it up on an individual Daily Rule basis.

In reading the timesheet you need to be aware that when, say, Monday has a time of 22:00 next to it, this could be 22:00 on Monday or on Sunday depending on whether you have set the daily Rule to put the hours to the 1st day or 2nd day respectively. The timesheet status box will tell you when you hover the mouse over the time the actual date of the clocking so you need be in no doubt.

With shifts over midnight you have to be extra careful when adding times to the timesheet. Because of the reason above, when you click on an empty cell to add a time, the default date may not be the one you are expecting. You need to check this and optionally change it when you add the new clocking. Don't forget, when you add or edit a clocking you can change the Time, In/Out status, Reason and Date.

The timesheet will always display clockings in chronological order.

With shifts over midnight you need to make use of the tools and indicators available on the timesheet to make sure that you get the results you are expecting.

Working over Midnight

The choice you make for allocating hours on the Daily Rule to the 1st or 2nd day also affects how you set up the Work Schedule. Consider the following Work Schedule:

| Twilight 16:00 to 01:00 | | | | | |
|-------------------------|-------------------------|------------|------------|------------|------------|
| Short Code | Name | Days | | | |
| T1 | Twilight 16:00 to 01:00 | 7 | | | |
| | Schedule A | Schedule B | Schedule C | Schedule D | Schedule E |
| Monday | WKS3 16:00 to 01:00 | | | | |
| Tuesday | WKS3 16:00 to 01:00 | | | | |
| Wednesday | WKS3 16:00 to 01:00 | | | | |
| Thursday | WKS3 16:00 to 01:00 | | | | |
| Friday | WKS3 16:00 to 01:00 | | | | |
| Saturday | | | | | |
| Sunday | | | | | |

The Work Schedule specifies a single Daily Rule (WKS3) on which the hours of work are from 16:00 to 01:00.

Note that the Work Schedule specifies the day the hours are allocated to, not the day the shift starts. In this respect the day that the hours are allocated to on the timesheet match the days on the Work Schedule.

Daily Rule Hours go to the First Day: If you programme the Daily Rule to direct the worked hours to the First Day, the timesheet will place the 15:53 IN clocking on Monday afternoon against Monday on the timesheet. Friday totals (04:30) in the example are highlighted as a Target Hours (System) Exception. All clockings correctly allocate to the WKS3 shift.

| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Rate 4 | Sick | Hol | Shift |
|------------|-------|--------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x01.00 | x01.00 | |
| Mon 06 Feb | 15:53 | 20:26 | 20:59 | 00:59 | 08:30 | | | | | | WKS3 |
| Tue 07 Feb | 15:55 | 20:30 | 20:57 | 00:56 | 08:30 | | | | | | WKS3 |
| Wed 08 Feb | 15:51 | 20:28 | 20:58 | 00:59 | 08:30 | | | | | | WKS3 |
| Thu 09 Feb | 15:57 | 20:30 | 20:58 | 00:56 | 08:30 | | | | | | WKS3 |
| Fri 10 Feb | 15:49 | 20:32i | | | 04:30 | | | | | | WKS3 |
| Sat 11 Feb | | | | | | | | | | | |
| Sun 12 Feb | | | | | | | | | | | |

Daily Rule Hours go to the Second Day: In this case, although the shift starts at 16:00, the hours accrued are allocated to the next day. So the Work Schedule above expects the employee to start work for the week on Sunday night at 16:00, and the hours for that shift would accrue to Monday. Put another way, for hours to accrue to Monday, the employee has to clock IN on Sunday afternoon. If the timesheet were calculated with the Work Schedule and times above, but the Daily Rule set up to put hours on the 2nd day, we obtain the following result:

| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Rate 4 | Sick | Hol | Shift |
|------------|--------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x01.00 | x01.00 | |
| Mon 06 Feb | Absent | | | | 00:00 | | | | | | |
| Tue 07 Feb | 15:53 | 20:26 | 20:59 | 00:59 | 08:30 | | | | | | WKS3 |
| Wed 08 Feb | 15:55 | 20:30 | 20:57 | 00:56 | 08:30 | | | | | | WKS3 |
| Thu 09 Feb | 15:51 | 20:28 | 20:58 | 00:59 | 08:30 | | | | | | WKS3 |
| Fri 10 Feb | 15:57 | 20:30 | 20:58 | 00:56 | 13:00 | | | | | | WKS3 |
| | 15:49 | 20:32 | | | | | | | | | DEF |
| Sat 11 Feb | | | | | | | | | | | |
| Sun 12 Feb | | | | | | | | | | | |

In this case, as the employee did not clock on Sunday afternoon 5th February, he/she has no hours for Monday and is marked as Absent on Monday.

The 15:53 IN time against Tuesday is the clock IN on Monday at 15:53.

The 15:49 IN time against Friday is a clock IN on Friday at 15:49. Because the employee is not Scheduled to come to work on Saturday, there is no shift to autoallocate to and the totals are calculated using the default shift for Friday. This means the employee is working 2 shifts on Friday, WKS3 and DEF and the totals for the 2 shifts combined are put against Friday.

If the employee had been scheduled to optionally work the same shift on Saturday as below:

| Twilight 16:00 to 01:00 | | | | | |
|-------------------------|-------------------------|---------------------|------------|------------|------------|
| Short Code | Name | Days | | | |
| T1 | Twilight 16:00 to 01:00 | 7 | | | |
| | Schedule A | Schedule B | Schedule C | Schedule D | Schedule E |
| Monday | WKS3 16:00 to 01:00 | | | | |
| Tuesday | WKS3 16:00 to 01:00 | | | | |
| Wednesday | WKS3 16:00 to 01:00 | | | | |
| Thursday | WKS3 16:00 to 01:00 | | | | |
| Friday | WKS3 16:00 to 01:00 | | | | |
| Saturday | | WKS3 16:00 to 01:00 | | | |
| Sunday | | | | | |

the half day at the end of the week would have been allocated to Saturday:

| Date | In | Out | In | Out | Rate 1 | Rate 2 | Rate 3 | Rate 4 | Sick | Hol | Shift |
|------------|--------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| | | | | | x01.00 | x01.25 | x01.33 | x01.50 | x01.00 | x01.00 | |
| Mon 06 Feb | Absent | | | | 00:00 | | | | | | |
| Tue 07 Feb | 15:53 | 20:26 | 20:59 | 00:59 | 08:30 | | | | | | WKS3 |
| Wed 08 Feb | 15:55 | 20:30 | 20:57 | 00:56 | 08:30 | | | | | | WKS3 |
| Thu 09 Feb | 15:51 | 20:28 | 20:58 | 00:59 | 08:30 | | | | | | WKS3 |
| Fri 10 Feb | 15:57 | 20:30 | 20:58 | 00:56 | 08:30 | | | | | | WKS3 |
| Sat 11 Feb | 15:49 | 20:32 | | | 04:30 | | | | | | WKS3 |
| Sun 12 Feb | | | | | | | | | | | |

7 Absences

7.1 Calendar

Absences menu - Calendar



Calendar Shortcut Button

This screen provides a 'Year to View' Absence Calendar for an employee and allows you to book and unbook holidays and absences.

102997 Megan Broadhurst

2007

| Month | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | |
|----------|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|---|--|
| Jan 2007 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | | |
| Feb | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | | | | | |
| Mar | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | |
| Apr | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | |
| May | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | |
| Jun | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | | |
| Jul | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | |
| Aug | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | |
| Sep | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | |
| Oct | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | |
| Nov | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | | | | |
| Dec | | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | |
| Jan 2008 | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | | | | |

Key

- Absent (System)
- Sick Paid
- Company Service
- Sick Unpaid
- College
- Public Holiday
- Works Shutdown
- Christmas Break

Statistics for 01/01/2007 to 31/12/2007

Holidays (Days)

| Allowance | Extra | Taken | Booked | Available |
|-----------|-------|-------|--------|-----------|
| 20 | 0 | 10 | 0 | 10 |

Sick Days: 9

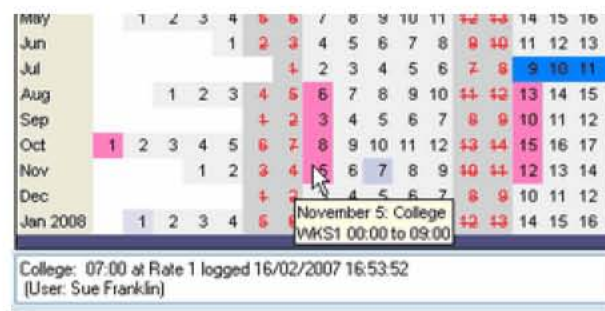
Display Absence Type

- ☒ Normal
- ☒ Sick Paid
- ☒ Public Holiday
- ☒ Schedule
- ☒ Holiday
- ☒ Sick Unpaid
- ☒ Absence
- ☒ System

The screen analyses Holidays taken as well as booked but not taken as of the current date. Note that the Holiday Start Date can be any day of the year and is set up individually in the **Employee menu - Holidays** tab. The days indicated in red with a strike through are rest days as defined by the Work Schedule. The Roster is presently not shown on the calendar.

You can filter the display using the tick boxes in the bottom right corner.

Hovering over the calendar displays details of the Daily Rule planned/worked and any absence booked in the tool tip text and in the status panel.



Navigating from the calendar

Right click on a Cell in the Calendar to navigate to the Employee screen, the Employee's Timesheet for the date selected, or to the Daily Rule for the date selected.



Booking Absences on the Calendar

To book an absence on the Calendar, left click a cell or highlight a block of cells.

Book Absences

08/02/2008

| Rate | Hours | Reason |
|------|-------|---------|
| 1 | | |
| 2 | 07:00 | College |
| 3 | | |
| 4 | | |
| 5 | | |
| 6 | | |

New Booking

Reason: College

Hours: 07:00 Rate: Rate 2

☐ Add to Hours Worked ☒ Replace Hours Worked

Comment: Sitting final exams

Groups

Virginia Ackerman

You can book a single Date or a range of Dates. You can set the Reason, hours to Add To or Replace any worked hours, and add a comment. The Comment becomes part of the [Absence Periods Report](#). The Group Frame at the bottom of the booking screen allows you to specify a single Employee, a

Group of Employees, or All Employees. Use the  Delete Button to cancel any booked absences. All changes are logged in the system [Audit Trail](#).

The 'Days Sick' is the number of days sick taken to date for the holiday year.

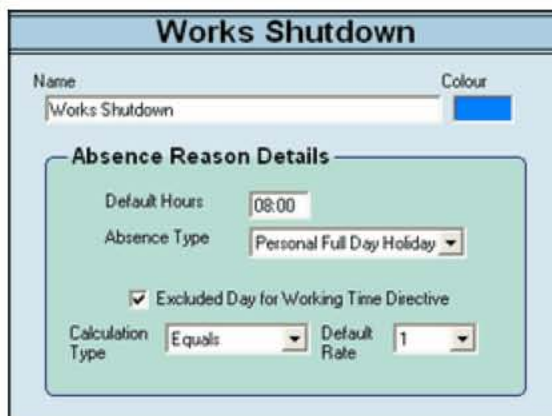
Click on the  button for a colour report facsimile of the screen, or  for a text only report.

7.2 Definitions

Absences menu - Definitions

When you edit an employee's Clocking Times or Calculated Totals, or book time away from work for an employee, you allocate an Absence Reason so that the system can analyse the changes and generate reports.

This screen defines the Absence Reason:



Name and Colour: You define the Name of the absence e.g. Holiday and the colour used in various reports. You may find it useful to group like types of absence by colour. Eg. Public Holidays in blue, sicknesses in green etc. This will help when it comes to view the Absence Calendar.

Default Hours: When you book an absence the system supplies the Default Hours as the suggested duration to book off. You may override this at the time of booking.

Absence Type: Select from Full Day or Half Day Holiday, Public Holiday, Sick and Normal.

Excluded Day: An Excluded Day for the purpose of the Working Time Regulations is a day when the employee is not working. As such, the day is not included in working out the average hours worked over the reference period. For instance, holidays and sickness reasons would be excluded days, but Company Service would not.

Calculation Type and Rate: You can programme the system to Add hours to a day or Set the number of hours in a day at any of the 6 rates.

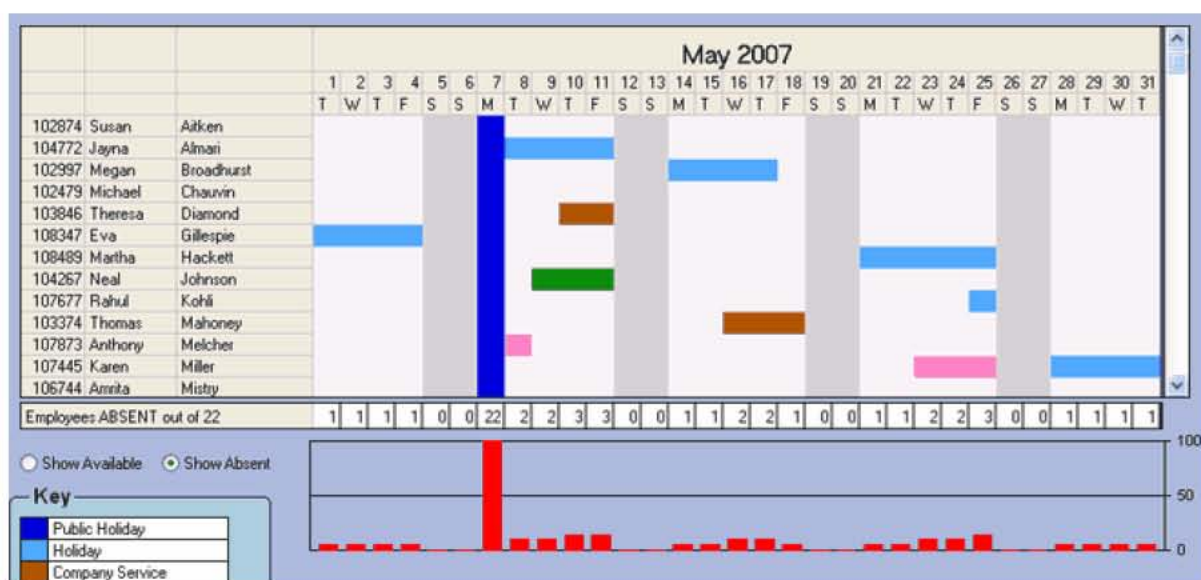
7.3 Availability

Absences menu - Availability



Availability Shortcut Button

This screen shows a monthly view of employees absence bookings within a Group.



You can select the absence types to be included in the totals - Holiday, Sick, Bank Holiday and Other and you can elect to view the totals and the graph as numbers Absent or numbers Available.

Reports available from the drop down list  show the results in three different views:

Text Shows one month's results as a textual report.

Workforce Availability

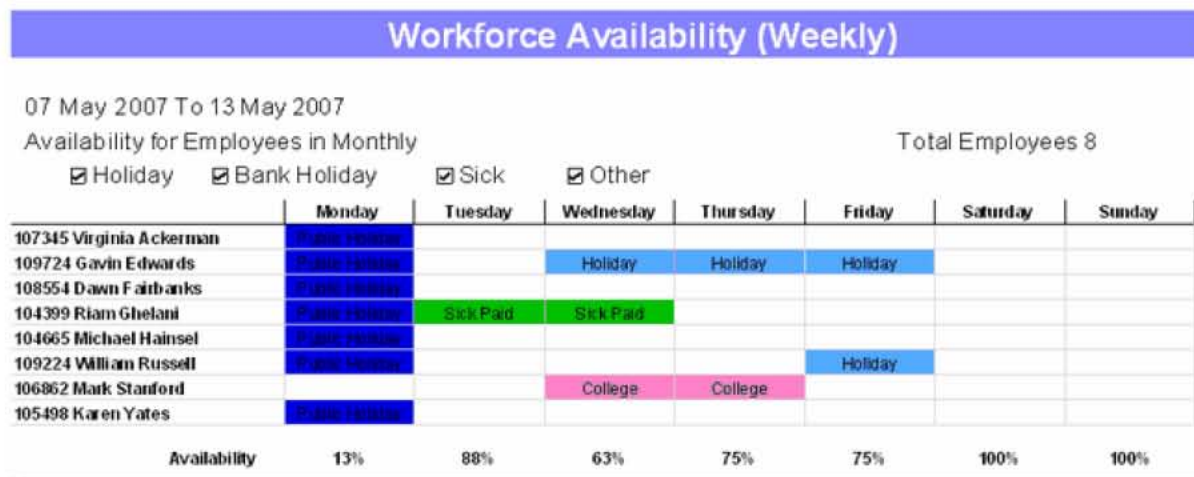
May 2007

Total Employees 22

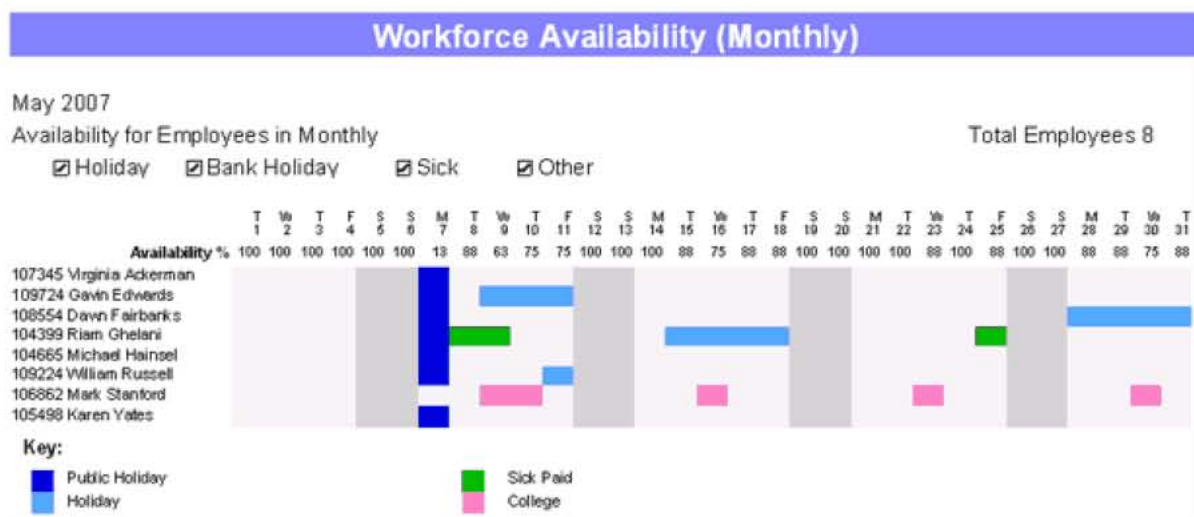
Availability for Employees in Weekly

| | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Total | % |
|------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------|-----------|
| Date | Holiday | Bank Holiday | Sick | Other | Absent | Available |
| 01/05/2007 | 1 | 0 | 0 | 0 | 1 | 95 |
| 02/05/2007 | 1 | 0 | 0 | 0 | 1 | 95 |
| 03/05/2007 | 1 | 0 | 0 | 0 | 1 | 95 |
| 04/05/2007 | 1 | 0 | 0 | 0 | 1 | 95 |
| 05/05/2007 | 0 | 0 | 0 | 0 | 0 | 100 |
| 06/05/2007 | 0 | 0 | 0 | 0 | 0 | 100 |

Week A week-at-a-view with details of Absence reasons.



Month Graphical month view with colour key for absences.



The User can set up absences on the Availability view in the same way as on the [Calendar](#).

8 User

8.1 Password

User menu - Password

When a New User is set up they are allocated a User Name, a Password, and a set of System Access Attributes by the System Supervisor. The User needs to provide the Name and Password to Log in to use the system. Once logged in, the user may change his/her own password (The System Supervisor cannot change and does not know the User's Password once it has been changed). When the System Supervisor creates a new User the password for that User is automatically set to the same word as the chosen User Name.

It is important for the user to protect their password as sensitive changes that a user may make (such as modifying clocking times on a timesheet) are attributed to that user and logged in the [Audit Log](#) against that user.

8.2 Log In

User menu - Log In

A User, once logged in, can log in again as a New User, thus providing that User with several 'Aliases'.

8.3 Log Out

User menu - Log Out

A User should Log Out if leaving the system unattended for any length of time to prevent unauthorised use of their Access Rights to the system.

9 System

9.1 Archive

System menu - Archive

To make the system quick and easy to manage you can Archive off those employees whose details you no longer want to view on a regular basis. This is used, for instance, when an employee leaves the Company. When their information is no longer regarded as 'current' they can be sent to the System Archive.

After this is done, they no longer appear in the Employee List. At any time, however, they can be brought back from the Archive by making them Live again and their details can be viewed in the normal manner.

The screenshot shows a software interface titled "Employees". It is divided into two main sections: "Current" and "Archived".

Current Section:

- On the left, there are three input fields: "Employees" with the value 30, "Clockings" with the value 7258, and "Edited Clockings" with the value 34. Below these is a button labeled "Go To Archive".
- On the right is a table with the following data:

| Number | Name | Start Date | Left Date |
|--------|------------|------------|------------|
| 107345 | Ackermane | 14/12/2005 | 30/07/2006 |
| 102874 | Aitken | 09/04/2000 | |
| 104772 | Amlani | 30/01/2006 | |
| 102997 | Broadhurst | 04/12/2001 | |
| 102479 | Chauvin | 06/12/1999 | |
| 103846 | Diamond | 12/03/1996 | |
| 109724 | Edwards | 14/05/2003 | |
| 104399 | Ghelani | 12/10/1996 | |
| 108347 | Gillespie | 06/12/1997 | |
| 108489 | Hackett | 14/07/2000 | |
| 104665 | Hainzel | 19/08/2004 | |
| 104667 | Johnson | 22/05/2005 | |

Archived Section:

- On the left, there are three input fields: "Employees" with the value 4, "Clockings" with the value 527, and "Edited Clockings" with the value 0. Below these is a button labeled "Delete".
- On the right is a table with the following data:

| Number | Name | Start Date | Left Date |
|--------|-------------|------------|-----------|
| | brown | 05/04/2006 | |
| 102935 | Butterworth | 06/02/2003 | |
| 102884 | Campbell | 04/08/1994 | |
| 108554 | Fairbanks | 12/06/2002 | |

The Archive screen above presents 2 lists - those employees Current, or 'Live' and those employees Archived.

The buttons 'Go to Archive' and 'Go to Live' are used to move employees in and out of the archive. Simply select the employee and click on the button.

When you highlight an employee who is in the 'Archived' list you can either return them to Current or Delete them. You will find that the system will not allow you to delete employees who are still registered on the clock.

9.2 Audit Log



System - Audit

The Audit Log shows the System User who made the change, the time and date when the change was made, the employee Payroll Number and Last Name (if the change was to an employee's timesheet) what the change was and any comments that were attached at the time by the System User.

| User | Logged Time | Number | Last Name | Change | Detail |
|--------------|---------------------|----------|-----------|---|--------------------|
| Supervisor | 16/11/2005 16:06:19 | | | System Setup saved | |
| Supervisor | 16/11/2005 16:02:00 | | | Advanced Download from 15/11/2005 to 16/11/2005 | 100 new Record(s) |
| Supervisor | 16/11/2005 15:58:45 | | | Clock Setup changed | |
| Supervisor | 16/11/2005 15:57:52 | | | Clock Setup changed | |
| Supervisor | 16/11/2005 15:25:34 | PN712729 | Anderson | Absence Booking Added 12/12/2005 - 16/12/2005 | Company Service |
| Supervisor | 16/11/2005 15:23:44 | PN712729 | Anderson | Absence Booking Added 20/12/2005 | Holiday |
| Supervisor | 16/11/2005 15:23:26 | PN712729 | Anderson | Absence Booking Added 21/12/2005 | College |
| Supervisor | 16/11/2005 13:29:35 | | | Supervisor logged in | Supervisor |
| sue miller | 16/11/2005 13:28:55 | PN627641 | Armistead | Clock IN on 16/11/2005 at 09:13 changed to IN at 07:30 | |
| sue miller | 16/11/2005 13:27:47 | PN627641 | Armistead | Clock IN on 16/11/2005 at 10:39 changed to IN at 09:13 | |
| sue miller | 16/11/2005 13:19:37 | | | User Logged In | |
| Supervisor | 16/11/2005 13:19:19 | | | System User Edited | sue miller |
| Supervisor | 16/11/2005 13:18:32 | | | Supervisor logged in | Supervisor |
| chris horner | 16/11/2005 13:16:24 | PN627641 | Armistead | Edited Rate 2 on 16/11/2005 from 00:00 (calculated) to 03:00 (edited) | Dental Appointment |
| chris horner | 16/11/2005 13:14:04 | PN627641 | Armistead | Edited Rate 1 on 16/11/2005 from 01:15 (calculated) to 08:00 (edited) | Holiday |
| chris horner | 16/11/2005 13:12:25 | PN627641 | Armistead | Edited Rate 1 on 17/11/2005 from 00:00 (calculated) to 08:00 (edited) | Holiday |
| chris horner | 16/11/2005 11:52:43 | PN10005 | Smith | Edited Rate 1 on 01/11/2005 from 00:00 (calculated) to 08:00 (edited) | Company Service |
| chris horner | 16/11/2005 11:48:16 | PN10005 | Smith | Edited Rate 1 on 14/11/2005 from 00:00 (calculated) to 06:30 (edited) | College |
| chris horner | 16/11/2005 11:46:18 | PN210368 | Barber | Clock OUT on 14/09/2005 at 12:00 changed to OUT at 12:01 | |


The list can be sorted by any column in ascending or descending order. The default is to sort the list in descending order of date and time (i.e. lists the most recent first).

The Audit Log also has a Start Date and End Date picker so you can define the historical range of the listed log.

The  button produces a printable list report of the Log as seen on the screen and the  button allows you to export the Log in any of the 4 available export formats.

From time to time while making changes to the system which would require an event to be logged you may see this message:



The Audit log contains up to 10,000 entries. To purge the log, go to **System | Audit Log**, and click on the  purge button. This will remove all but the last 50 entries from the Audit Log file. It will also record the user who carried out the Purge operation.

9.3 Clock Utilities

System menu - Clock Utilities

The Clock menu gives the System User access to the clocking terminal. As such they will only function on a PC connected to the clock.

9.3.1 Status

System menu - Clock Utilities - Status tab

Clicking on the Status Tab on the Clock Utilities screen allows you to check and set the main operating parameters of the clocking terminal:

The screenshot shows the 'Clock Utilities' window with the 'Status' tab selected. The interface includes a 'Clock' dropdown menu set to 'Works TCP/IP' and a 'Connection Setup' button. The 'HRX Terminal' section contains several fields: 'Software' (Rev 2.005), 'Terminal ID' (1000), 'Employee Capacity' (200), 'Employees Used' (41), 'Clockings to Download' (0), 'Date' (10/11/2006), 'Minimum In/Out minutes' (0), 'Maximum Shift Hours' (10), 'Next BST starts' (25/03/2007), and 'Next GMT starts' (28/10/2007). There are 'Get Status from Clock' and 'Send to Clock' buttons. The 'Time' section shows 'Time' as 13:21:56 and a 'Set Time' button. At the bottom, there is a navigation bar with tabs: 'Status' (highlighted), 'Employees', 'Upgrade', 'Download', 'TCP/IP', 'Bells', and 'Access Control'.

Software: This is the version and release number of the software fitted to the clocking terminal. Read only.

Terminal ID : This is the unique ID registration number of your clocking terminal. Read only.

Employee Capacity : The clocking terminal is configured to hold a maximum number of employees. This may be increased through the Upgrade process. The Employee Capacity displays the maximum number of employees your clocking terminal is configured to hold. Read only.

Employee Used : This parameter tells you how many employees are currently registered on the clock. Read only.

Clockings to Download : Tells you how many clocking records are currently held by the clocking terminal. Read only.

Date : This is the date held by the clock. Read from the clock and written back if changed when you click on the 'Send to Clock' button.

Minimum In/Out Minutes : This is the minimum number of minutes allowed between In and OUT clockings for the same employee. This parameter is used to dissuade employees from producing 'nuisance' clockings. This would normally be set to, say, 2 or 5 minutes. If the employee clocks within this time period they will be presented with a message informing them they are infringing this rule. This parameter is read from the clock and can be written back to it if changed.

Maximum Shift Hours : The clocking terminal usually keeps track of whether an employee is clocking IN or OUT, based on his/her last clocking. If an employee forgets to clock out, the terminal uses the **Maximum Shift Hours** parameter to judge that the next clocking is an IN rather than an OUT. The value of this parameter depends on the expected length of your maximum period between an IN/OUT sequence, but it would be normal to set this to around 15 hours. This parameter is read from the clock and written back to it if changed.

Example: If Maximum Shift Hours is set to 15 hours and an employee clocks IN at 06:00, if he/she next clocks **before** 21:00 the terminal will judge them to be clocked OUT. If they clock IN at 06:00 and then next clock any time **after** 21:00, the terminal will judge that they forgot to clock out and are, in fact, clocking IN. The Focus software will mark the 06:00 clocking as an infringement with the reason 'Forgot to Clock Out'. The software will also generate an Exception, 'Target Hours (System)' if you have set the Target Hours for the Daily Rule corresponding to the 06:00 start time.

Next BST starts & Next GMT starts : The clock is programmed with these dates so it can automatically make the BST/GMT adjustment during the night on the date concerned.

The clock adjusts the time as follows:

Start of BST: at 02:00 (AM), changes the time to 01:00 (AM)

Start of GMT: at 02:00 (AM), changes the time to 03:00 (AM)

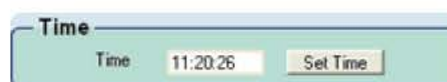
You can set the dates for the changeover anything up to a year in advance. When the clock makes the adjustment it calculates and saves the date for the next changeover of that time (BST or GMT) as follows:

Set start of BST to the Last Sunday in March

Set start of GMT to the Last Sunday in October

These dates are read from the clock and are written back to the clock if changed.

Time:



The time is held in a separate frame on the Clock Utilities Status Tab as sending the time to the clocking terminal takes a degree of care. When you click on the 'Get Status from Clock' button, this box shows the exact time that the clock shows. This box is not updated unless you click on the button again. To set the time on the clocking terminal, enter a time into the box that is, say, 15 seconds ahead of the current time and when the 15 seconds have elapsed click on the 'Set Time' button. Note that this sets the time on the clocking terminal and has no effect on the PC clock.

9.3.2 Employees

System menu - Clock Utilities - Employees tab

This screen allows the System User to directly interrogate the employee data stored on the clocking terminal.

The screenshot shows the 'Clock Utilities' window with the 'Employees' tab selected. At the top, there is a 'Clock' dropdown menu set to 'Works TCP/IP' and a 'Connection Setup' button. Below this is a section titled 'Synchronise Employees Clock/PC' containing a checkbox labeled 'Load Clock from Employee Database'. The 'Employees On Clock' section displays '1 of 41' and a 'Delete' button, with navigation buttons 'First', 'Previous', 'Next', and 'Last' below. To the right is a 'Find Badge' section with a text input field and a 'Find' button. The 'Data from the Clock' section shows fields for 'Badge' (20005202), 'Fire Group' (1), 'Line 1' (LESLEY), 'Access Group' (0), 'Line 2' (OLDFIELD), and 'Clock In/Out' (Out). A red 'Clear Data' box contains 'Clear Employees' and 'Clear Clockings' buttons. At the bottom is a navigation bar with buttons: 'Status', 'Employees' (highlighted), 'Upgrade', 'Download', 'TCP/IP', 'Bells', and 'Access Control'.

Navigation Buttons: Using the 'First', 'Previous', 'Next' and 'Last' buttons the user can cycle through the employee list. Details are displayed in the frame 'Data from the Clock'. Note that this information is transmitted directly from the clocking terminal.

Delete Employee: An employee can be deleted from the clock using the 'Delete' button but this should normally be carried out from the Employee screen.

Load Clock from database: Should your clocking terminal hardware fail and need replacement, a new clock can be reloaded from the PC database using the 'Load Clock from Employee Database' button.

Find Badge: Enter a badge number and click on 'Find' to look up a badge number on the Clock.

Clear Data: The Employees and/or Clockings can be deleted from the clock, but you should only use these functions under the guidance of your supplier.

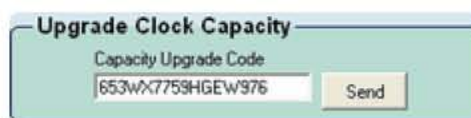
9.3.3 Upgrade

System menu - Clock Utilities - Upgrade tab

The clocking terminal comes equipped with the capability of storing information on ('registering') a maximum number of employees. Once this maximum limit is reached you cannot add more employees without first deleting some. You can increase the employee capacity with an extra cost upgrade to your terminal which can be carried out by requesting an upgrade code from your system supplier. See product documentation for telephone numbers.

You will be asked for the clock serial (ID) number and the new employee capacity you wish to upgrade to. The **serial number** and capacity can be found from the Status screen on the Clock Utilities menu. You will be given a 16 digit upgrade code.

You should enter the Upgrade Code into the screen below and click on the 'Send' button. All letters should be entered as capitals.



Once the code has been received by the clock and the upgrade completed you will receive an acknowledgement message from the clock.

You can check the new Status which will confirm the new Employee Capacity and number of employees used.

9.3.4 Advanced Download

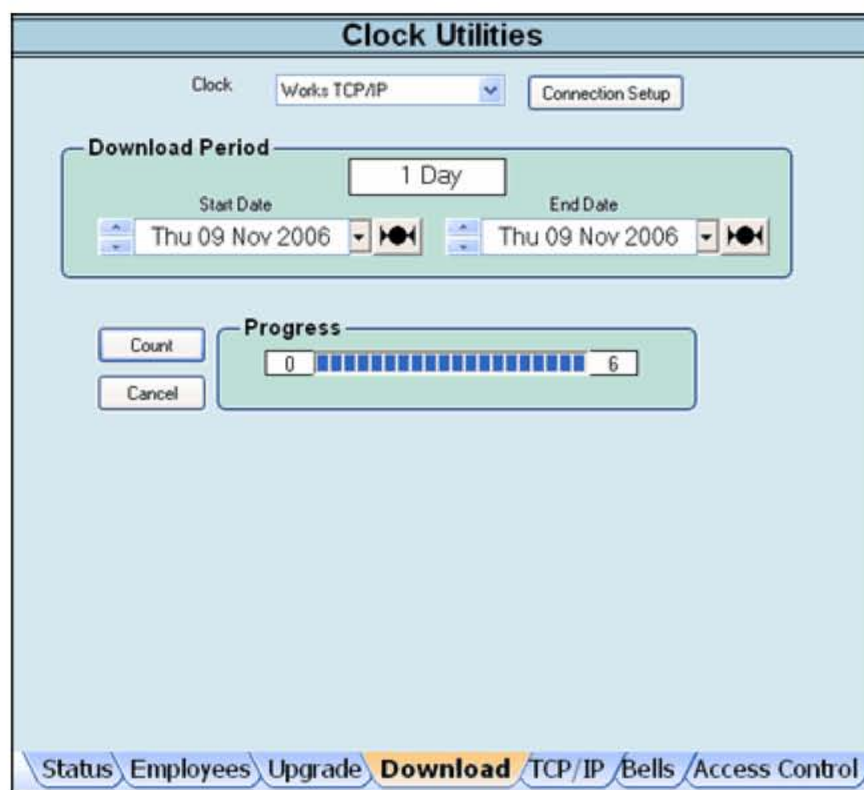
System menu - Clock Utilities - Download

'Download' is the process of collecting employee clockings from the clocking terminal into the PC. Day to day the System User should use the Download function on the Times menu. This single button Download operation collects only new clockings from the clock (i.e. clockings that have occurred since the last download or since the last scan from the Watch screen).

The Advanced Download facility in Clock Utilities is provided in case you suspect some clocking records may have been lost (possibly caused, for instance, by PC power outage during normal download). Proceed as follows:

Set the Start and End Date of the Download using the Date Selectors.

Click on the 'Count' button and the clock will search its database and count all clocking records that fall within the date range you have given it.



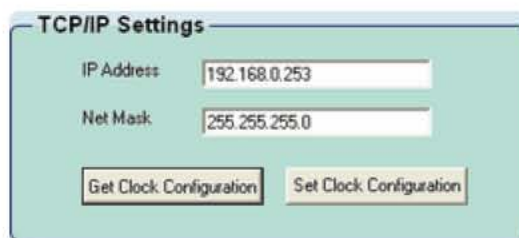
Don't worry about duplicating clockings on the PC by carrying out successive Downloads. Any Clocking Records the PC already has are ignored.

9.3.5 TCP/IP

System menu - Clock Utilities - TCP/IP

To allow the clocking terminal to be used as part of your Ethernet network, it must be assigned an IP Address by your network administrator.

The Clock Utilities - TCP/IP Tab allows your administrator to inspect and set the IP Address that is held within the clocking terminal. This would normally be achieved by communication over the RS-232 link to the PC.



TCP/IP Settings

IP Address: 192.168.0.253

Net Mask: 255.255.255.0

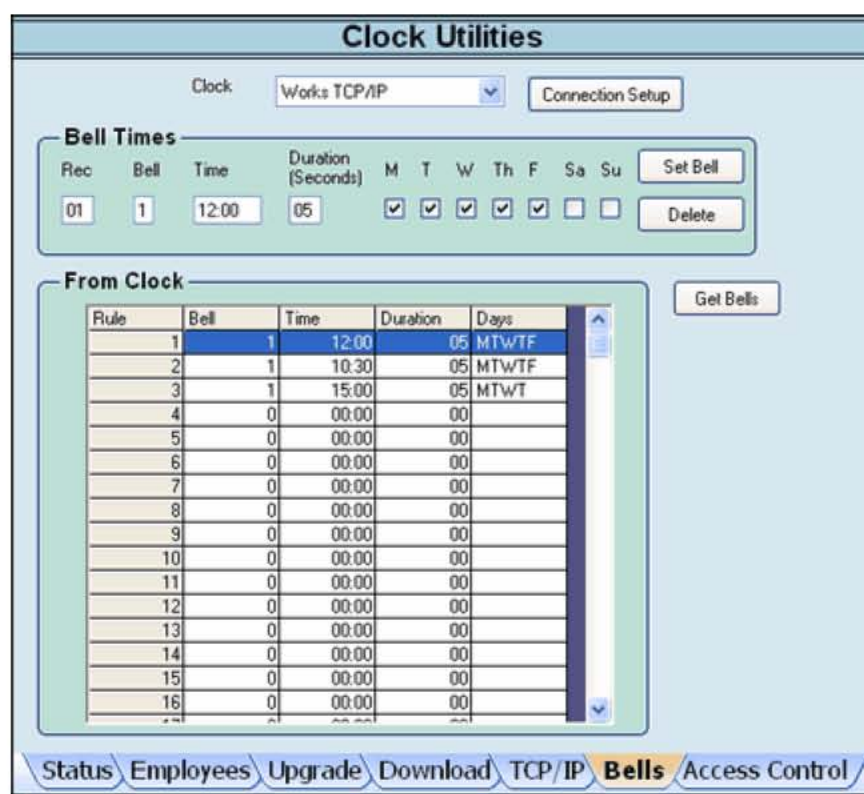
Get Clock Configuration Set Clock Configuration

Setting the IP Address is Password protected to prevent inadvertent modification.

9.3.6 Bells

System menu - Clock Utilities - Bells

The HRX5000 terminal contains 2 relays which may be programmed to operate factory bells or can be utilised to control access points. The 2 relays may be used to operate 2 different bells. Each relay is independent and can be used for either function. The HRX3000 terminal does not support this feature.



Clock Utilities

Clock: Works TCP/IP Connection Setup

Bell Times

| Rec | Bell | Time | Duration (Seconds) | M | T | W | Th | F | Sa | Su | |
|-----|------|-------|--------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------|
| 01 | 1 | 12:00 | 05 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Set Bell Delete |

From Clock

| Rule | Bell | Time | Duration | Days | |
|------|------|-------|----------|-------|--|
| 1 | 1 | 12:00 | 05 | MTWTF | |
| 2 | 1 | 10:30 | 05 | MTWTF | |
| 3 | 1 | 15:00 | 05 | MTWT | |
| 4 | 0 | 00:00 | 00 | | |
| 5 | 0 | 00:00 | 00 | | |
| 6 | 0 | 00:00 | 00 | | |
| 7 | 0 | 00:00 | 00 | | |
| 8 | 0 | 00:00 | 00 | | |
| 9 | 0 | 00:00 | 00 | | |
| 10 | 0 | 00:00 | 00 | | |
| 11 | 0 | 00:00 | 00 | | |
| 12 | 0 | 00:00 | 00 | | |
| 13 | 0 | 00:00 | 00 | | |
| 14 | 0 | 00:00 | 00 | | |
| 15 | 0 | 00:00 | 00 | | |
| 16 | 0 | 00:00 | 00 | | |

Get Bells

Status Employees Upgrade Download TCP/IP **Bells** Access Control

The HRX5000 terminal contains 20 Bell Times which can be shared between the two relays.

To view or modify Bell Times, click on the **Get Bells** button which will load the grid with the rules. To modify a rule, select it from the grid, edit the parameters in the Bell Times frame and send the rule to the clock using the **Set Bell** button.

9.3.7 Access Control

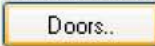
System menu - Clock Utilities - Access Control


The HRX5000 terminal contains 2 relays which may be programmed as part of an Access Control scenario. The HRX3000 terminal does not support this feature.

An HRX5000 can control up to 2 doors. The terminal has, for each door:

- A Relay to control the Lock;
- A Proximity Reader placed next to the Door;
- A Door Exit button with time delay;
- A Door Open input.

Each Door has programmable parameters associated with it which can be accessed using the

 button from the Access Control Tab. An HRX5000 Master terminal can hold the rules for up to 50 Doors.



| Rule | Terminal | Door | Release | Exit | Ajar | PassBack | Fire Release | Fire Status | Polarity | Name |
|------|----------|------|---------|------|------|----------|--------------|-------------|----------|-----------------|
| 1 | 1999 | 1 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | N/A | Reception |
| 2 | 1999 | 2 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | N/A | Stores Entrance |
| 3 | 1065 | 1 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | N/A | IT Room |
| 4 | 1065 | 2 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | IN | Side Entrance |
| 5 | 1066 | 1 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | IN | Main Gate IN |
| 6 | 1066 | 2 | | 2 | 5 | 00:00:00 | 00:00 | 00:05 | OUT | Main Gate OUT |
| 7 | 0 | 0 | | 0 | 0 | 00:00:00 | 00:00 | 00:00 | N/A | Fail Locked |
| 8 | 0 | 0 | | 0 | 0 | 00:00:00 | 00:00 | 00:00 | N/A | Fail Locked |
| 9 | 0 | 0 | | 0 | 0 | 00:00:00 | 00:00 | 00:00 | N/A | Fail Locked |
| 10 | 0 | 0 | | 0 | 0 | 00:00:00 | 00:00 | 00:00 | N/A | Fail Locked |

The Door Rules are stored in the Master HRX5000 and a copy saved in the FOCUS database using the 'Write to Disk' button.

To View/Modify a Door Rule, click on the 'Read from Clock' or 'Read from Disk' button to load the table. Highlight a specific rule in the table which is then transferred into the Door Rule frame for editing.

Terminal: The number of the Terminal which will hold the Rule. This can be obtained from the **Clock Utilities | Status** screen.

Release Time: When a valid card is presented to the Reader next to the Door, the Door lock will be released for a duration equal to this time.

Exit Delay: Determines the time for which the door will remain unlocked when the Exit Button is pressed.

Door Ajar Time: An Alarm Record is generated when the door remains Ajar after it has been unlocked. Currently this Alarm is used only as a record of the event and no action is taken.

Anti-Passback Time: When an employee uses his/her card to gain access through this door he/she will not be allowed access again until they have presented their card to another reader or this predetermined time has passed. Set to zero to disable this feature.

Fire Alarm Release Time: When the Fire Alarm activates it can be programmed to release each door. To disable this feature, set the timer to zero. The door stays unlocked while the Fire Alarm is active, and remains unlocked for the time set after the Fire Alarm condition returns to normal.

Fire Alarm Status: Granting access to this Door modifies the current employee status for the Fire Alarm Report. Personnel passing through this access point can be deemed as IN or OUT for the Fire Report, or can have no effect.

As each Door Rule is edited, you can use 'Send' to send it to the HRX5000. On completion of editing, use the 'Write to disk' to save a copy in the FOCUS database.

Having set up the Rules for each door, the actual Access Rules can be defined. These Rules define the time bands during which different Access Groups will be granted Access to through the Door. The Rules are obtained from the clock, modified and sent back as with the Door rules.

Access Rule

Record (1-199) Door Group (1-99) Start Time End Time M T W Th F Sa Su

006 Stores Entrance 01 09:00 17:00 ☒ ☒ ☒ ☒ ☒ ☐ ☐

Clock ☒ 1999 ☐ Relay 1 ☐ Relay 2 ☐ Bar Clockings

Access Rules

Read from Clock Write to Disk Read from Disk Write to Clock

199 199

| Rule | Clock | Type | Group | Start | End | Days | Door |
|------|-------|--------|-------|-------|-------|---------|-----------------|
| 1 | 1065 | Door 1 | 01 | 09:00 | 24:00 | MTWTF | IT Room |
| 2 | 1065 | Door 2 | 01 | 08:00 | 20:00 | MTWTF | Side Entrance |
| 3 | 1066 | Door 1 | 01 | 07:00 | 20:00 | MTWTF | Main Gate II |
| 4 | 1066 | Door 1 | 01 | 09:00 | 12:00 | S | Main Gate II |
| 5 | 1066 | Door 2 | 01 | 08:00 | 24:00 | MTWTFSS | Main Gate C |
| 6 | 1999 | Door 2 | 01 | 09:00 | 17:00 | MTWTF | Stores Entrance |
| 7 | | | | | | | |
| 8 | | | | | | | |
| 9 | | | | | | | |
| 10 | | | | | | | |
| 11 | | | | | | | |
| 12 | | | | | | | |

Status Employees Upgrade Download TCP/IP Bells Access Control

An HRX5000 Master can hold up to 200 Access Control Rules. The Rules can be sent to the terminal and a copy saved in the FOCUS database in the same way as the Door Rules are maintained.

Group: Each employee can be set up to belong to an Access Group in the **Employees | Clock** tab. This Group is then allowed access to the Doors defined by the Clock and Release, the time band and

the Day flags.

Bar Clockings: You can use an Access Control Rule to define a time period for a Group of employees when they are not able to clock IN and OUT on a particular terminal. The Group here is the Access Group as defined on the employee's [Clock Tab](#).

9.3.8 Templates

System menu - Clock Utilities - Templates

The Focus software is capable of interfacing to the Recognition Systems Hand Geometry Reader as well as its own, native, HRX range of proximity clocking terminals. You can specify a connection to a Hand Reader via the [Connections](#) screen and you can connect by RS-232, Modem or TCP/IP.

The Hand Reader takes a 3D image of an employee's hand at the time of clocking and compares this image with a stored 'template'. The original template is created by the Hand Reader taking an initial set of 3 images and averaging the result as part of the employee enrolment process. Each employee is assigned an ID number which references their template. When an employee wants to clock IN or OUT they enter their ID number, the type of clocking and then present their hand to be scanned and compared with their stored template.

The templates screen allows the Focus system user to manage the storage of the hand templates. Using this screen the user can:

1. Create a database backup of the templates stored in a Hand Reader.
2. Transfer the templates in the database to a Hand Reader, allowing multiple readers to be set up with the same templates.

Clock Utilities

Clock: Hand Reader Connection Setup

Templates

| Database (Blue=Template In DB) | Reader |
|--------------------------------|-----------------|
| 612 Campbell | 612 Campbell |
| 365 Chauvin | 365 Chauvin |
| 102 Amari | 109 Edwards |
| 109 Edwards | 122 Fairbanks |
| 122 Fairbanks | 125 Gillespie |
| 125 Gillespie | 128 Hainsel |
| 127 Hackett | 236 Roberts-Hor |
| 128 Hainsel | 150 Johnson |
| 236 Roberts-Horsie | 159 Mistry |
| 150 Johnson | 155 Melcher |
| 104 Diamond | 167 O'Hara |
| 159 Mistry | 195 Palmer |
| 154 Mahoney | 151 Kohli |
| 155 Melcher | 237 Russell |
| 158 Miller | |
| 160 Nelson | |
| 167 O'Hara | |
| 195 Palmer | |
| 151 Kohli | |
| 237 Russell | |
| 267 Smith | |

Get All From Reader
Save All To Database
Send All To Reader

Status Templates

Note that Clock Utilities only shows 2 tabs when connected to a Hand Reader.

The left hand column lists all employees in the database that have an ID number set up on their employee form.

Jack Campbell

| | | | |
|-------|----------------|-----------|----------|
| Title | First Name | Last Name | ID |
| Mr. | Jack | Campbell | 00000612 |
| | Payroll Number | Job Title | |
| | 102884 | Operator | |


Note that the ID Number is only shown if the system is using the Hand Punch as a data collection terminal. This number has the same function as the Badge Number on a badge reader system. The number shown in the Template List is the ID Number of the employee on the Hand Punch. Only employees highlighted in blue have a copy of their hand template stored in their records in the Focus Database.

Get All From Reader

Clicking on **Get All From Reader** checks the Hand Reader to see which of the employees in the left hand list have a template existing in the attached Hand Reader and any found are listed in the right hand list.

Save All To Database

Clicking on **Save All To Database** adds to the database any templates found on the Hand Reader and updates the colour indicator in the left hand list.

Clicking on  sends a copy of the templates highlighted in blue to the attached Hand Reader.

The System Administrator should use these features to make a back up of the hand templates in a reader to protect against failure of the Hand Reader hardware. Also, in a system using multiple Hand Readers a user can enrol on one reader and have his/her hand template distributed to the other readers in the system.

9.4 Fire Alarm Printout

System menu - Fire Alarm

The HRX3000 and HRX5000 terminals are capable of generating their own Fire Alarm report based on the data they hold on employees' clockings. Other terminals supported by the Focus Software, e.g. the Recognition Systems Hand Punch, do not support this feature.

Note: This option will not appear in the System Menu if you do not have an HRX3000 or HRX5000 terminal set up as an active [Connection](#).

Note: As an alternative, you may generate a [Fire Alarm Roll Call Printout](#) direct from the software. This needs the software to be running, then network printers to be switched on and connected, and a User to be available to initiate the printout from the software.

Your HRX terminal keeps track of Employees as they clock IN and OUT and maintains a record of those employees who are clocked IN. You can connect your fire alarm panel to the clocking terminal so that if and when the fire alarm is activated, the clock will automatically generate a list of all those employees who are clocked IN on the system.

The clock requires a connection from the alarm panel which is:

A 'voltage free' set of contacts connected via the Fire Alarm Input cable. You should request your Fire Alarm Panel Installer to make this connection for you. As a manual alternative, or as a 'Test Switch', you can connect a Push to Make switch instead of, or in parallel with, the Alarm Panel connection. A suitable wall mountable switch is available for this purpose.

The Fire Alarm Printout lists Employees present, [Fire Muster Group Number](#) with a Page Break at the end of each group to allow for separating the printout into lists for separate Fire Alarm Muster locations.

The printer is connected to the clock using a Fire Alarm Printer cable. This is a **Serial RS-232** printer cable which needs to be plugged into a **Serial RS-232** port on your printer. This is normally terminated at the printer end in a DB-25 socket. You may need to refer to your printer manual for the details of the pinouts.

If your printer does not have a serial RS-232 port you must use a 'Serial RS-232 to Parallel Converter' plugged between the serial cable and the printer Parallel (sometimes referred to as Centronics) port. Contact your system supplier for more details.

9.4.1 Printout Format Design

System | Fire Alarm

The HRX terminal generates the Fire Alarm Report with the following Basic Format:

```
Fire Alarm Rollcall      Printed 04/01/05 15:34:50      Fire Group 04

                        Badge      Last Clocked In
ROGERS                  PN10045    12346666  04/01/05 15:30:25
PARKES                  PN10519    12343333  04/01/05 15:34:43
SMITH                   PN10005    12341111  04/01/05 15:30:23
BATTERSHAW              PN25100    10012222  04/01/05 15:33:54

Total Present for Fire Group 04=4

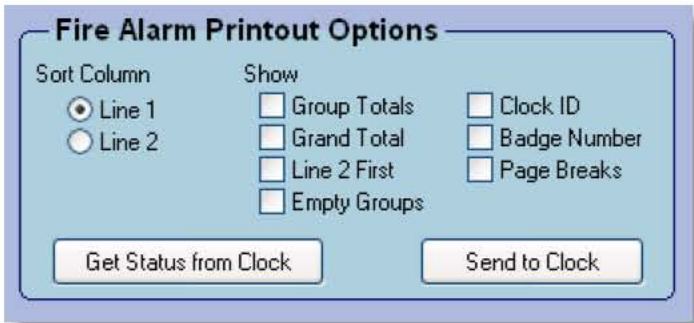
** PAGE BREAK **

Head Count Total is 4
```

The report is broken into separate Fire Groups and lists employees clocked IN to the system. Column 1 contains the text normally shown on Line 2 of the display when the employee clocks (up to 16 characters). Column 2 shows the Line 1 text (up to 10 characters). Column 3 is the badge number and column 4 displays the time and date when the employee clocked IN.

Any employees who are technically clocked IN after the end of the Maximum Shift Length parameter will not be included as they are deemed to have forgotten to clock OUT.

The User can modify the Basic Layout of the Fire Alarm Printout from the **System | Fire Alarm** screen:



The dialog box titled "Fire Alarm Printout Options" contains two sections: "Sort Column" and "Show".

Sort Column:

- ☒ Line 1
- ☐ Line 2

Show:

- ☐ Group Totals
- ☐ Grand Total
- ☐ Line 2 First
- ☐ Empty Groups
- ☐ Clock ID
- ☐ Badge Number
- ☐ Page Breaks

At the bottom, there are two buttons: "Get Status from Clock" and "Send to Clock".

When the User modifies the Printout Options, the new layout must be sent to the clock for the settings to take effect.

The User can experiment with different layouts and check their effect using the 'Send Fire Alarm to PC' option button.

9.4.2 Send Fire Alarm Printout to PC

System - Fire Alarm

This option only functions on the PC connected directly to the clock.

When you click on the 'Generate Fire Alarm printout and send to PC' button, the PC requests the clock to generate a Fire Alarm Printout and direct it to the PC. The PC replaces the printer 'Page Break' (or 'go to the top of the next page') function with the text **** PAGE BREAK ****.

9.4.3 Show Fire Alarm Printer Status

System - Fire Alarm

This option only functions on the PC connected directly to the clock.

Clicking on the 'Show Fire Alarm Printer Status' button causes the PC to ask the clock to check the state of its Fire Alarm Printer 'Ready' signal.

This is the mechanism by which the printer signals to the clock that it is ready to receive information to be printed.

If the clock indicates that the printer is **NOT READY** this indicates that any of the following conditions is **TRUE** :

- The printer is not switched on;
- The printer is not connected to the clock (cable unplugged at printer end or clock end);
- The Ready Signal in the cable is not connected to the correct pin in the DB-25 connector normally pin 4 or pin 20;
- The Printer is 'Out of Paper';
- The printer is switched to 'Off Line' (there is usually a button on the printer front panel to take it On and Off Line).

9.4.4 Send Test Printout to Printer

System - Fire Alarm

This option only functions on the PC connected directly to the clock.

Click on the 'Send short test printout to fire alarm printer' button to cause the clock to send a brief test printout to the Fire Alarm Printer. This will help you check that the printer is switched on and ready to receive data and that the printer is set up to the correct communications format for the clock.

See also [Fire Alarm Printout Troubleshooting](#)

9.4.5 Send Fire Alarm Printout to Printer

System - Fire Alarm

This option only functions on the PC connected directly to the clock.

Clicking on the 'Generate Fire Alarm printout and send to Printer' button causes the clock to generate it's Fire Alarm Printout and send the report to the Fire Alarm Printer. This has the same effect as activating the Fire Alarm Printout through the Fire Alarm Panel or through any manual push switch connected to simulate the panel.

9.4.6 Fire Alarm Printout Troubleshooting

System - Fire Alarm

The clock cannot send the report to the printer if the printer is not ready to receive data. Examining the Printer Status will confirm whether the printer is ready or not.

The clock sends the report as a stream of serial RS-232 data. This differs from the more usual (parallel) method and has the advantage that a relatively long cable (up to 100 metres as opposed to 2 metres) can be used and the cable needs only 3 conductors rather than the 30 or so used by a parallel cable. The downside is that the speed and format of the serial data, which is set at the clock end, has to be matched at the printer end.

There will be small (DIP) switches or some other means on the printer for setting the BAUD Rate and Word Format. These determine the speed and structure of the information sent across the cable. There will be a section in your printer manual telling you how to set these up.

You must set the printer (or Serial to Parallel Converter) to the following settings:

Baud Rate: 9,600 Baud (or Bits per second or BPS);

Word Format: 8 Data Bits
1 Stop Bit
No Parity

If the printer prints some text when the Fire Report is generated, but the text is random garbage, the Baud Rate or Word Format will be set incorrectly.

If the printer prints large blocks of text correctly but seems to have lost chunks of data (compare the actual printed output with the report sent to the PC), the most likely cause is the Ready signal from the printer not connected. When this happens the sending device either does not send at all (more usually), or sends even if the printer is not ready in which case data gets lost. Use the Printer Status utility to check the state of the printer's Ready signal with the printer switched 'off' and 'on' or 'off line' and 'on line'.

NB: Your printer must be capable of printing 'Raw Text' as opposed to requiring a Windows Driver. This may not be true of newer, lower cost, PC Printers.

Laser Printers and 'Time to First Page'.

When using a Laser Printer the 'time to first page' parameter for the printer will be particularly important for a Fire Evacuation printer. Because the printer heater needs to reach temperature before it can print (it thermally fixes the toner to the paper), this parameter can be substantially effected by ambient temperature. A figure of 6 seconds quoted at room temperature can increase to 45 seconds or more as the temperature drops. This can be offset by setting the printer to not go into standby mode. Consult your printer setup manual for more information.

9.5 Set Up System

System Menu - Set Up System

You should use the System Set Up screen to configure the system the way you want it before entering any substantial volume of employee data or collecting large numbers of clockings.

9.5.1 General

System menu - Setup - General tab

System Settings

Report Footer Text

Hours Format

Start of Week

System Start Date

Sick Year Start Date

Subject Description

Insurance Description

Currency

Badge Length

Max Break

☐ Ask to Backup on Exit
☐ Rota Quantities
☐ Return to Work Interviews
☐ Initial First Name in Employee List
☐ Advanced Weekly Rules
☒ Advanced Daily Rules
☒ Unique Payroll Numbers

☐ Simple Rota View
☒ Allow 'No Reason' on Edits
☒ Show 'No Reason' on Calendar
☐ Edits Update File Report On HRX
☐ Service Refresh Totals
☐ Synchronise Clocks On Download

General | Groups | Rates | Colours
 User Fields | Printers | Cost Centres | Payroll | Holiday

ReportFooterText: Appended at the bottom of each report page printed.

HoursFormat: When the system calculates hours worked it can display them as hours and minutes

(hh:mm) format or hours and decimal parts thereof (hh.dd). Use the drop down box to choose one of the options.

Clocking Times are always displayed in hh:mm format.

Note that the system stores the underlying data and carries out the calculations in hours and minutes and only converts to decimal for display purposes. It is therefore possible that a long column of decimal times may not exactly add up to the displayed total for the column due to a cumulative rounding effect.

Start of Week Day: You can start your week on any Weekday. This is a single parameter for the whole system.

Ideally this parameter should be set once only, but you can change this if you need to. This has major implications for the underlying data. See Weekly Totals for implications of changing this day on any stored data.

System Start Date: Set this date to the earliest date from which you want the system to automatically generate absence notification on failure of employees to clock.

The timesheet displays "Absent (System)" if it determines an employee should have worked but did not clock on a particular day. An employee cannot be Absent if the date in question is before the Employee Start Date (set up on the Employee Form). Similarly, the employee cannot be absent if the date is before the System Start Date. See also [Absence \(Conditions for\)](#)

Sick Year Start Date: Certain Reports present an analysis of 'Sick Days this Year'. You can set the Start date of the 'Sick Year' to a global date for all employees. In this way, you can align it to the Company accounting year, or Tax year etc.

Subject Description: You can customise the term FOCUS uses to refer to the personnel clocking on the system in the menus and reports. For example, although most organisations will be using 'employee', the term 'temp', 'pupil', 'teacher' etc. might be more appropriate.

Insurance Description: On the Employee screen Contact tab there is a field for the employee National Insurance number. The textual description of this field can be customised to suit the national terminology.

Currency: Certain reports can be made to produce actual cash values for employee payments (if the User has access rights to cash information) in which case the currency symbol is shown on the report. Here you can select whether you want currency to be shown as Pounds, Euros or Dollars.

Badge Length: The HRX3000 and HRX5000 terminals can be used with two different types of proximity badge technology. The 125KHz technology manufactured by the HID Corporation use 8 numeric characters in their badge number whereas the 13.56 MHz Mifare badges use 10 numeric characters to represent the Unique ID number of the badge. The badge Length must be set according to the technology in use with your system.

Max Break: This is the number of hours FOCUS will allow for a break in working hours before it starts a new shift. Consider the following clocking pattern:

IN 09:00 OUT 12:30
IN 15:00 OUT 19:00

If Max Break is set to 4 or more, the system will interpret the clockings as a single shift with a 2:30 break in the middle of the day. If Max Break is set to 3 or less, the clockings will produce a split shift and apply 2 sets of Daily Rules.

Ask to Backup on Exit: Tick this option if you want Focus to prompt the user 'Do you want to make a Backup of your Database?' every time on exiting the program.

Rota Quantities: Selecting this option creates 3 extra rows on the Rota screen, 'Quantity', 'Items per Hour' and 'Cost per Item'. Having planned the Rota, the User can enter the Quantity of Items planned to be manufactured or processed for each day. The system will then calculate, based on the planned hours for the day the number of Items per Hour and their Cost.

Return to Work Interviews: The system allows you to enter the date of a Return to Work Interview against each period of absence. If you tick this option, whenever you book or edit an absence you will be able to add the date of a Return to Work Interview. These dates, along with any associated comments, can be reported using the Absence Period report.

Initial First name in Employee List: To reduce the amount of screen width taken by the Employee List (such as on the Timesheet Screen) you can use this option to display the First Name as an Initial only, rather than the full name.

Advanced Weekly Rules: This box should only be ticked if you have commissioned special Weekly Rules which have required the writing of 'Scripted' Weekly Rules. These will have been implemented by your system integrator.

Advanced Daily Rules: This box should only be ticked if you have commissioned special 'Scripted' Daily Rules. These will have been implemented by your system integrator.

Unique Payroll Numbers: Tick this box if you wish Focus to enforce unique payroll numbers.

Simple Rota View: Normally, when the Rota screen is displayed, all the T&A rules are shown on the tree view on the left side of your screen. This includes the Daily Rules, Weekly Rules and Work Schedules. If you prefer, you can show only the Daily Rules to simplify the selection process for programming the Rota.

Allow 'No Reason' on Edits: If this box is unticked, users will not be able to edit Timesheets, Calendars or Availability screens without providing a reason for the edit.

Show 'No Reason' on Calendar: Tick this box to display on the Calendar absences booked without supplying an edit reason.

Edits update Fire Reports on HRX terminals: If an employee forgets to clock, their clocking can be entered by a supervisor. If the clocking is for the current day, their status on the Fire Report can be changed by sending the timesheet edit back to the clocking terminal (applies to HRX series of terminals only). If this box is ticked, entering an employee's clocking on a timesheet for today will cause Focus to prompt the user 'Do you want the new status to appear on the Fire Report?'

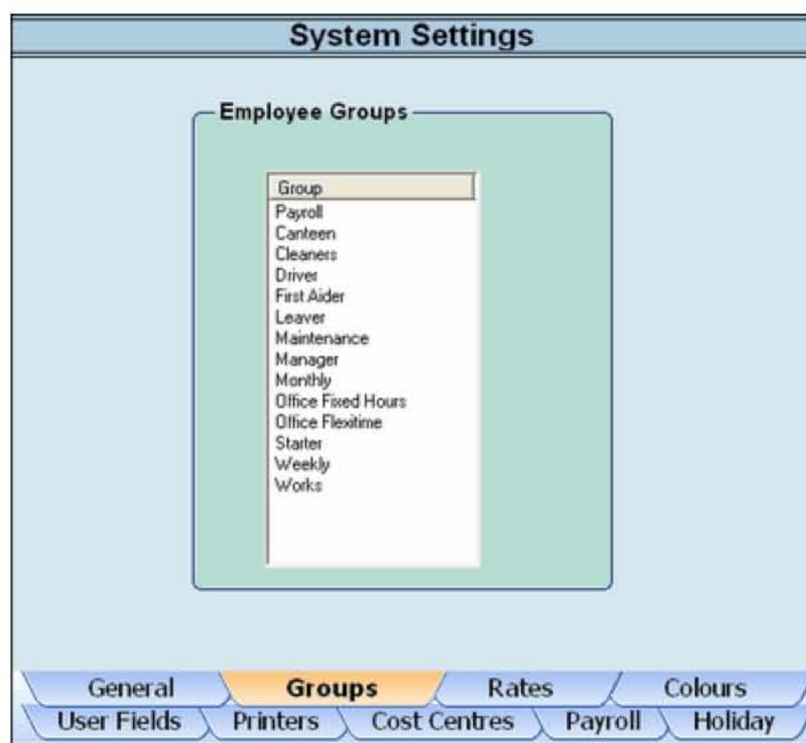
Service Refreshes Totals: In a Multi-User configuration, FOCUS can be set up to run as a service on your server. In this case, the service is responsible for downloading the clock(s) specified by the Watch tick box on the relevant Connection definitions. If the 'Service Refreshes Totals' box is ticked, the service will also recalculate any timesheets affected by the clockings it downloads. If you do not want your server to perform these calculations, they can be carried out by one of the client PCs.

Synchronise Clocks On Download: Instructs FOCUS to update the terminal Date and Time with the Date and Time from the PC each time it downloads the terminal.

9.5.2 Groups

System menu - Setup - Groups tab

Employee Groups are used to select employees for viewing and reporting purposes. Groups can be any type of classification to suit your operation. They could be, for instance, names of Departments, types of Skill, Pay Type, Work Pattern or any other type of classification. The only limitation is that each employee may belong to no more than 5 groups.



You may Add, Edit and Delete Groups as you wish with the exception that you may not Edit or Delete the Payroll Group which is the fixed group used by the Payroll Export function.

9.5.3 Rates

System menu - Setup - Rates tab

System Settings

Rate Descriptions

| | | Sum | Weekly Total |
|--------|--------|-------------------------------------|-------------------------------------|
| Rate 1 | Rate 1 | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rate 2 | Rate 2 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rate 3 | Rate 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rate 4 | Rate 4 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rate 5 | Rate 5 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Rate 6 | Rate 6 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Summation Column:

General **Groups** **Rates** **Colours**
User Fields **Printers** **Cost Centres** **Payroll** **Holiday**

Rate Descriptions: The 6 rate columns are labelled by default as Rate 1 to Rate 6. These headings appear on the timesheet and on reports where the hours are shown by Rate. You can change the headings here for any free text up to 6 characters long. You can use some of the Rate columns, for example, for Sick and Holiday, so that the system automatically sums the total hours for these absence reasons or types.

Summation Column: Where reports show hours worked at the six rates, you have a seventh column available which can be used to sum any of the Rate columns. You could use this, for instance, to produce a 'total overtime' column which would be the sum of columns 2 to 6. You can also define the heading for the Summation Column in the same way that you can with the six Rate Columns.

Weekly Total: The Timesheet shows a Weekly Total Number of Hours worked which is usually the sum of hours worked at all six rates. However, as it is possible to set some of the columns up as bonus hours or currency, you can specify here which of the six rates columns contribute to the weekly Total Hours calculation.

9.5.4 Colours

System menu - Setup - Colours tab

The screenshot shows the 'System Settings' window with the 'Colours' tab selected. The 'System Colours' section contains three red buttons: 'Absence', 'Target Hours', and 'Default Rule'. The 'Report Colours' section contains a light grey 'Background' button and six colored buttons: 'Rate1' (green), 'Rate2' (yellow), 'Rate3' (red), 'Rate4' (pink), 'Rate5' (blue), and 'Rate6' (cyan). The bottom navigation bar includes tabs for 'General', 'Groups', 'Rates', 'Colours' (active), 'User Fields', 'Printers', 'Cost Centres', 'Payroll', and 'Holiday'.

System Colours: The system shows on the Calendar when an employee is Absent, fails to work the expected number of hours (Target Hours), or works an unexpected shift (Default Rule). Here you can select the colours on the Calendar which will be used to represent these exceptions.

Background Report Colour: The list reports have every alternate line set against a programmable background colour to help make long reports more legible. This background colour is light grey by default but you may change it to suit your printer. If you do not want this 'striping' effect, set the Background Colour to white.

Report Rate Colours: Colours used to depict Rate columns in reports.

9.5.5 User Defined Fields

System menu - Setup - User Defined Fields tab

FOCUS is capable of assigning an unlimited number of User Defined Fields to each Employee Record. The fields are specified here in System Setup. Data is entered and displayed on the Employee form and reports generated within the Employee Summary Report.

System Settings

User Fields

| Name | Type | Length | Lines |
|-------------|-------|--------|-------|
| VehicleMake | List | | |
| NOK | Text | 20 | 1 |
| NOKPhone | Text | 20 | 1 |
| NOKRelation | Text | 20 | 1 |
| VehicleMOT | Date | | |
| VehicleIns | Numbe | | |
| Photo | File | | |
| CV | File | | |

Field Name: VehicleMake
 Field Title: Vehicle Make
 Field Type: List

Ford
 Jaguar
 Vauxhall


Remove Add

General Groups Rates Colours **User Fields**
 Printers Cost Centres Payroll Holiday Absence Types

Each field can be of type Text, Number, File, List or Date. If you specify Text, you can also set up the number of characters and number of lines of text you wish the Employee Form to accept. In the case of File Type, FOCUS stores the path to the file and supplies a Browse and View button on the employee form. Use this field type for accessing an employee photograph and scanned images such as CV and contract of employment. In the case of List, you will be able to define a list of items to choose from when you enter the data on the Employee Form.

Field Name: A unique name that the database will use to reference the field. Note that space characters are not allowed.

Field Title: This is the text that will appear next to the field data on the Employee Form and also in the drop down list on the Employee Summary Report design form.

Field Position: Use the Up and Down Arrow  to position each User Defined Field within the list of Fields. This sets the position of the Field will occupy within the Employee Form.

9.5.6 Printers

System menu - Setup - Printers tab

Focus can generate a printout of all Employees present in the case of a Fire Alarm activation.



Fire Report

A button appears among the large icons when you tell Focus which printers you want to print the Fire Report on. You define the printers on the System Setup menu, Printers tab. Simply add the printers you wish to be used to generate the Fire Report. When a Focus system User clicks the 'Fire Report' button, the clocking terminal(s) will be downloaded and the printout sent to the nominated printer(s).

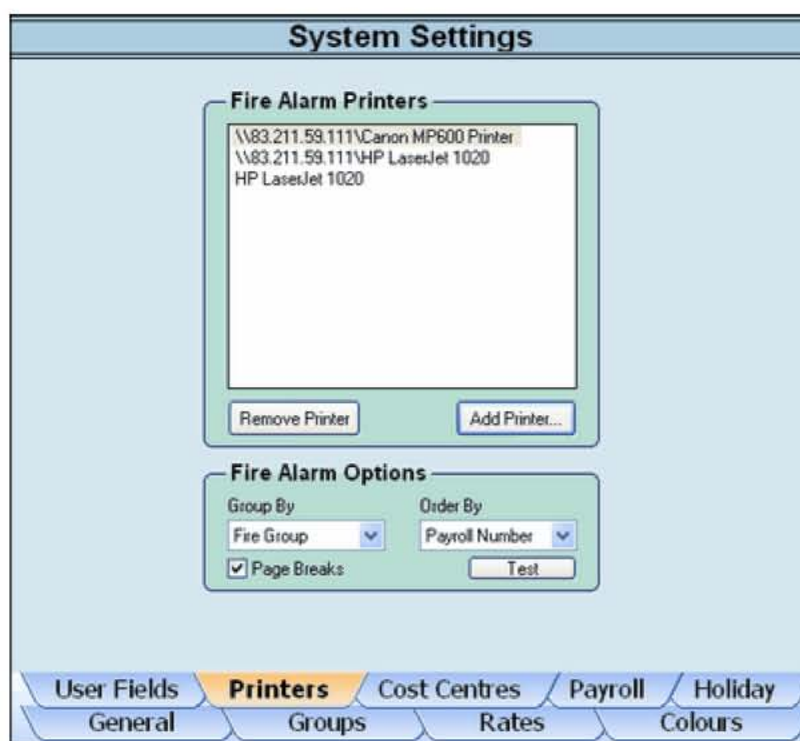
Note that this feature is software driven, unlike the Automatic Fire Alarm Printout supported by the HRX3000 and HRX5000 proximity clocking terminals. These terminals can create a printed report by connecting them directly to a printer, in which case no manual activation is necessary. See [Fire Alarm Printout](#). The PC Fire Report described here requires that the Focus Software is running, that the PC network is running to get data to the printers, and that the nominated user is available to click on the Fire Report button.

On this screen you also set up how you would like the fire Report to be formatted.

Group By: Allows you to group the Report by Fire Group or Terminal. In the case of Fire Group, the Employee (if present) will be listed under his/her Fire Group as it appears on the [Employee Form Groups tab](#). In this case, in the event of fire, the employee will be expected to return to their 'home' muster station. If you select grouping by Terminal, the Employee will be listed under the last Terminal at which he/she clocked. In this case the Employee will be expected to report to the nearest muster station to the place he/she last clocked.

Order By: Allows you to select the sorting of the Fire Report by the Employees' Payroll Number, First Name or Last Name.

Page Breaks: Forces a Page Break between the Fire Report Groups to allow you to send separated sheets of paper to different muster stations.

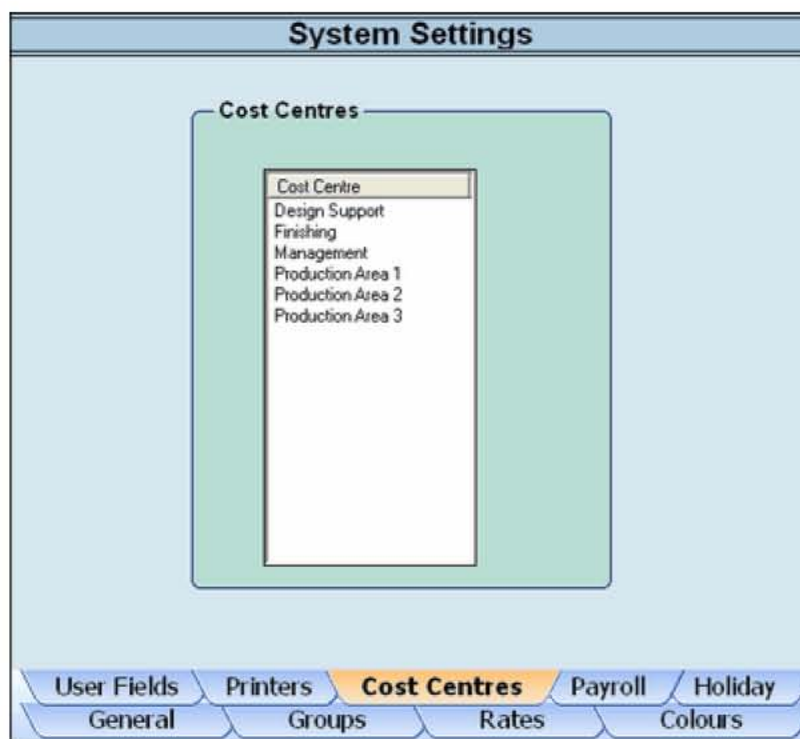


9.5.7 Cost Centres

System menu - Setup - Cost Centres tab

Focus allows you to set up Cost Centres and report hours planned and worked based on Cost Centres. A Daily Rule may be set up to be associated with a particular Cost Centre and when that rule is planned and worked, the hours are attributed to that Cost Centre.


Use this tab to set up your list of Cost Centres.



Use the standard New, Delete, Save and Cancel buttons to build your list of Cost Centres. Each Cost Centre has a colour associated with it, which appears on the selection list for the Daily Rules.

If you have set up Cost Centres, you can link a Daily Rule to a Cost Centre and the Daily Rules are listed by Cost Centre in the tree view.

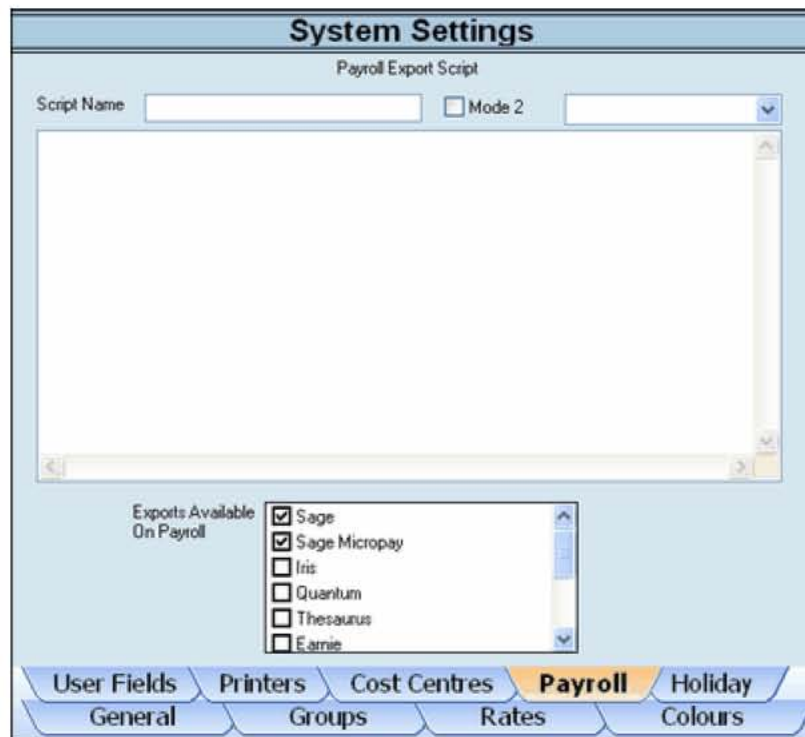


If you need to allocate the same Daily Rule to several Cost Centres, use the  Daily Rule 'clone' or 'duplicate' button to reproduce it and change the Cost Centre identity.

9.5.8 Payroll

System menu - Setup - Payroll tab

The Payroll tab on the System Setup screen allows you to define which Payroll Export options are offered from within the Payroll Report screen.



It also allows you to design your own custom formats for exporting hours worked to a Payroll package.

9.5.9 Holiday

System menu - Setup - Holiday tab

The Holiday tab allows you to set up the parameters for a range of employees for a new (or existing) holiday year.

| Employee | Start | End | Allowance | BroughtFwd | Adjust | Total |
|-------------------------------|------------|------------|-----------|------------|--------|-------|
| 106862 Mr. Mark Stanford | 01/01/2007 | 31/12/2007 | 20 | 0 | 1 | 21 |
| 105498 Miss Karen Yates | 01/01/2007 | 31/12/2007 | 20 | 0 | 3 | 23 |
| 107345 Mrs. Virginia Ackerman | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 106744 Mrs. Anrita Mistry | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 103374 Mr. Thomas Mahoney | 01/01/2007 | 31/12/2007 | 18 | 0 | 0 | 18 |
| 107873 Mr. Anthony Melcher | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 107445 Mrs. Karen Miller | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 100902 Mr. William Nelson | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 102466 Mr. Timothy O'Hara | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |
| 105624 Mr. Bruce Palmer | 01/01/2007 | 31/12/2007 | 18 | 0 | 0 | 18 |
| 107677 Mr. Rahul Kohli | 01/01/2007 | 31/12/2007 | 20 | 0 | 0 | 20 |

Each Holiday Year has a Start Date and End Date. The period covered need not be an exact year. Each Employee starts the year with an Allowance and an amount Brought Forward from the previous year. Adjustments can be made throughout the year for such as Holiday in Lieu, by editing the Adjustments Column on the individual [Employee Holiday tab](#).

Allowance, Brought Forward and Adjustments are summed to give a Total Allowance for the year. The Holiday Taken and Booked are subtracted from the Total Allowance to give an actual (or projected) End Balance at any time. To the End Balance is applied the Max Carry Forward to calculate the Carried Forward amount, which becomes the Brought Forward for the next period.

Using this screen you can set up the Start and End Dates of the holiday period, the Allowance, Adjustment and Max Carry Forward. You can apply the settings to individual Groups or all Employees. The data entry mechanism allows you to set one parameter at a time, without affecting the others. So, for instance, you can set the Max Carry Forward for a Group of employees without affecting their Adjustments, which may have been edited individually on the Employee Form.

Note that new holiday year records are created automatically when an Employee's Calendar is viewed for the first time. This allows you to book holidays for an Employee into the future, before the Holiday Year has been defined for the company in general.

See also [Holiday Report](#).

9.6 Set Up Users

System menu - Set up Users

If you have System Administrator rights you can set up System Users using the screen shown below:

| System User | | |
|--|--|--|
| User Name | Full Name | Password |
| abc | Administrator | *** |
| <input checked="" type="checkbox"/> Administrator | | |
| View | Edit | Actions |
| <input checked="" type="checkbox"/> Employee | <input checked="" type="checkbox"/> Employee | <input checked="" type="checkbox"/> Register Employee |
| <input checked="" type="checkbox"/> Timesheet | <input checked="" type="checkbox"/> Timesheet | <input checked="" type="checkbox"/> Clock Download |
| <input checked="" type="checkbox"/> System Setup | <input checked="" type="checkbox"/> Memo | <input checked="" type="checkbox"/> Free Alarm Setup |
| <input checked="" type="checkbox"/> Clock Setup | <input checked="" type="checkbox"/> System Setup | <input checked="" type="checkbox"/> Free Report |
| <input checked="" type="checkbox"/> Archive | <input checked="" type="checkbox"/> Clock Setup | <input checked="" type="checkbox"/> Modem |
| <input checked="" type="checkbox"/> Audit Trail | <input checked="" type="checkbox"/> Archive | <input checked="" type="checkbox"/> Backup |
| <input checked="" type="checkbox"/> Pay | <input checked="" type="checkbox"/> Pay | <input checked="" type="checkbox"/> Restore |
| <input checked="" type="checkbox"/> Schedules | <input checked="" type="checkbox"/> Schedules | <input checked="" type="checkbox"/> Unlock Timesheet |
| <input checked="" type="checkbox"/> Absence Reason | <input checked="" type="checkbox"/> Absence Reason | <input checked="" type="checkbox"/> Delete Original Clocking |
| <input checked="" type="checkbox"/> Calendar | <input checked="" type="checkbox"/> Calendar | <input checked="" type="checkbox"/> View Private Memo |
| <input checked="" type="checkbox"/> Watch | <input checked="" type="checkbox"/> Rota | <input checked="" type="checkbox"/> All |
| <input checked="" type="checkbox"/> Rota | <input checked="" type="checkbox"/> Rota Order | |
| <input checked="" type="checkbox"/> Timesheet Edit | | |
| <input checked="" type="checkbox"/> All | <input checked="" type="checkbox"/> All | |

General Objects

Name: When you create a New User, you specify a short name and full name.

Password: The system sets up an initial password for a New User which will be the same as the User Name. The User should subsequently change this to a memorable password of his/her own choosing via the [User - Password](#) menu. The administrator can subsequently reset the password if it is forgotten to the same as the User Name, but cannot otherwise change it.

The General Tab (shown above) gives you the ability to set the Access Rights of a particular Supervisor to the various features within FOCUS.

The Object Tab (below) allows you to fine tune what a Supervisor can do. For instance, a Supervisor may be set up to only have access to Groups of Employees under his/her supervision. Ability to produce reports may be limited to any subset of the reports on the system. Only certain types of absence booking may be permitted.

System User

User Name: g Full Name: guest Password: *

☐ Administrator

| Group | Name | Report | Name |
|--|---|---|---|
| <input checked="" type="checkbox"/> All | <input checked="" type="checkbox"/> Design Support | <input checked="" type="checkbox"/> Timesheets | <input checked="" type="checkbox"/> Christmas Break |
| <input checked="" type="checkbox"/> Payroll | <input checked="" type="checkbox"/> Finishing | <input checked="" type="checkbox"/> Payroll | <input checked="" type="checkbox"/> College |
| <input checked="" type="checkbox"/> Canteen | <input checked="" type="checkbox"/> Management | <input checked="" type="checkbox"/> Totals By Employee | <input checked="" type="checkbox"/> College |
| <input checked="" type="checkbox"/> Cleaners | <input checked="" type="checkbox"/> Production Area 1 | <input checked="" type="checkbox"/> Totals By Week | <input checked="" type="checkbox"/> Company Service |
| <input checked="" type="checkbox"/> Driver | <input checked="" type="checkbox"/> Production Area 2 | <input checked="" type="checkbox"/> Employees | <input checked="" type="checkbox"/> Forgot to Clock |
| <input checked="" type="checkbox"/> First Aider | <input checked="" type="checkbox"/> Production Area 3 | <input checked="" type="checkbox"/> Holidays | <input checked="" type="checkbox"/> Holiday |
| <input checked="" type="checkbox"/> Leaver | | <input checked="" type="checkbox"/> Memos | <input checked="" type="checkbox"/> Holiday AM |
| <input checked="" type="checkbox"/> Maintenance | | <input checked="" type="checkbox"/> Cost Variance | <input checked="" type="checkbox"/> Holiday PM |
| <input checked="" type="checkbox"/> Manager | | <input checked="" type="checkbox"/> Bradford Factor | <input checked="" type="checkbox"/> Public Holiday |
| <input checked="" type="checkbox"/> Monthly | | <input checked="" type="checkbox"/> Working Time Reg... | <input checked="" type="checkbox"/> Sick Paid |
| <input checked="" type="checkbox"/> Office Fixed Hours | | <input checked="" type="checkbox"/> Infringements | <input checked="" type="checkbox"/> Sick Unpaid |
| <input type="checkbox"/> Office Flexitime | | <input checked="" type="checkbox"/> Lateness | <input checked="" type="checkbox"/> Works Shutdown |
| <input checked="" type="checkbox"/> Starter | | <input checked="" type="checkbox"/> Absences | |
| <input checked="" type="checkbox"/> Weekly | | <input checked="" type="checkbox"/> Absence Periods | |
| <input checked="" type="checkbox"/> Works | | <input checked="" type="checkbox"/> Flexitime Balance | |
| | | <input checked="" type="checkbox"/> Flexitime Periods | |
| | | <input checked="" type="checkbox"/> Clockings | |
| | | <input checked="" type="checkbox"/> Who's In | |

☐ All ☒ All ☒ All ☒ All

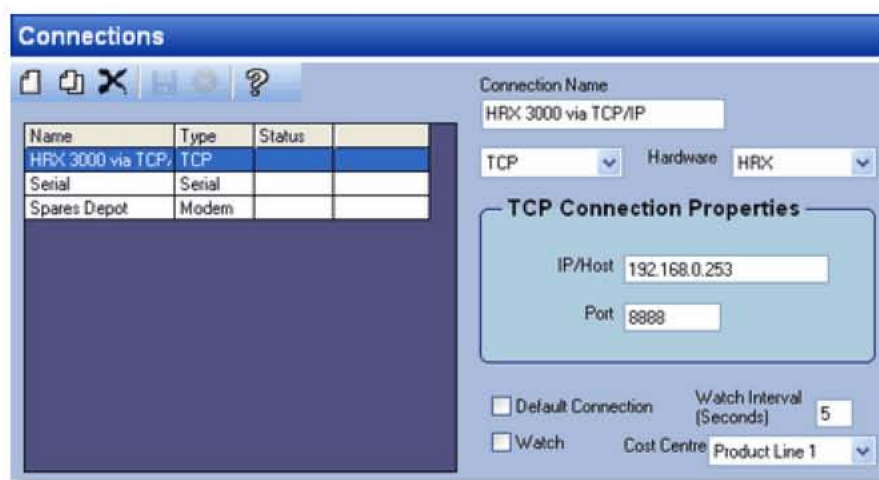
General **Objects**

Administrator: Ticking the ☐ Administrator check box gives the user Administrator rights which allows access to all areas of the system.

9.7 Connections

System menu - Connections

The Connections screen defines how your PC will connect to your clocking terminal(s). A PC may connect to more than one terminal, but only one at a time. The PC may connect via TCP/IP Ethernet, Modem or via a COMM port and serial cable. Your PC does not need to connect to the terminals to view the PC database, only to maintain employees on the clock, download the clock, and Watch employees' attendance in real time.



To define a connection, give the connection a name, pick the type of connection from the drop down list and set up the Connection Properties which are dependant on the Connection type.

When you connect to the clock using the **System - Clock Utilities** menu you will be able to pick which clock you want to connect to.

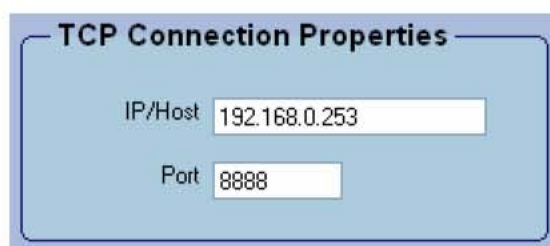
Default Connection: The Focus Software has one Default Connection which will be selected when the Clock Utilities Screen is loaded. If you do not select a Default Connection, no connection will be selected when the screen opens and attempts to access the clock will result in communications errors.

Watch: Ticking this box causes the software to include this terminal in the periodic scan from the Watch screen. Note that if you tick this box and a terminal is not connected, you will get an error every time the software attempts to connect.

Watch Interval: Defines the interval of time between successive scans from the Watch screen.

Cost Centre: If you have defined Cost Centres on the [System Setup | Cost centre tab](#), you can allocate a terminal to a Cost Centre.

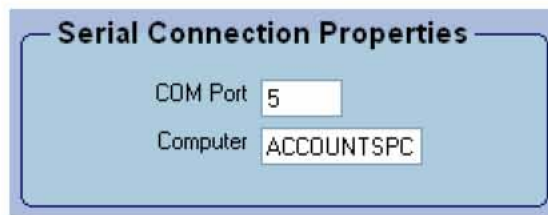
TCP/IP properties:



IP/Host is the IP Address programmed into the clocking terminal. This is factory set and will have been notified by your system administrator. The address can be read from the clock using an RS-232 connection.

Port Address: Normally 8888

Serial Properties:

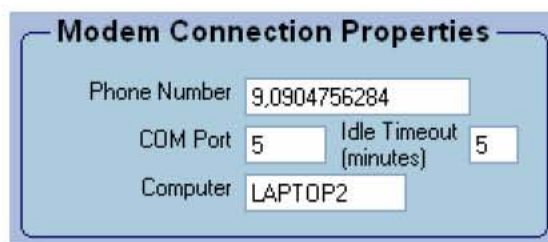


The image shows a 'Serial Connection Properties' dialog box. It has a title bar with the text 'Serial Connection Properties'. Inside the dialog, there are two labels: 'COM Port' and 'Computer'. The 'COM Port' label is followed by a text box containing the number '5'. The 'Computer' label is followed by a text box containing the text 'ACCOUNTSPC'.

COMM Port is the number of the port on the computer connected by dedicated cable to the clock.

Computer is the Computer name. This must be correct for a connection to be made to the clocking terminal.

Modem Properties:



The image shows a 'Modem Connection Properties' dialog box. It has a title bar with the text 'Modem Connection Properties'. Inside the dialog, there are four labels: 'Phone Number', 'COM Port', 'Idle Timeout (minutes)', and 'Computer'. The 'Phone Number' label is followed by a text box containing the number '9,0904756284'. The 'COM Port' label is followed by a text box containing the number '5'. The 'Idle Timeout (minutes)' label is followed by a text box containing the number '5'. The 'Computer' label is followed by a text box containing the text 'LAPTOP2'.

Phone Number is the telephone number of the line connected to the clock. You will need to add the prefix '9,' if you normally dial 9 for an outside line.

COMM Port is the number of the port on the computer connected to the modem.

Idle Timeout is the duration in seconds after which the phone line will be disconnected.

Computer is the Computer name.

Hardware: The Focus Software is able to communicate not only with its own, native, HRX3000 and HRX5000 terminals but also the Recognition Systems range of Hand Punches for reading 3D hand geometry. Select which type from the drop down Hardware box. When you select the Hand Punch most of the options on the Clock Utilities screen will become unavailable as they are not supported by the Hand Reader. The [Templates](#) tab will appear which allows you to manage the biometric hand patterns within the reader. Also, the Clock tab on the Employee form disappears as this is not supported by the Hand Reader.

9.8 Import

System menu - Import

The Employee Database may be imported from a .csv file.

Import

? **CSV to Import**

Open File...

Name 1, Name 2, Mr/Mrs, Addr1, Addr2, Addr3, Town, County, Zip
 John, Fellowes, Mr., 9 Dale Lane, Brisby, , , ,
 Lyn, Bradford, Mrs, 14 Summers crescent, , , , Farnborough, Hants,
 Ann, Downs, Mrs, The Gables, Back Lane, , , Shepshed, Yorks,
 Chris, Mitchell, Mr, Five Acres, Shore Road, , Willoughby, Notts,
 Mike, Barrow, Mr, 11a High Street, Wiggington, , Hinckton, Notts,

Fields

| Import Field | Focus Field |
|--------------|-------------|
| Name 1 | First Name |
| Name 2 | Last Name |
| Mr/Mrs | Title |
| Addr1 | Address 1 |
| Addr2 | |
| Addr3 | |

Import

Employees in Database

| Title | First Name | Last Name | Payroll Num | Job Title | Gross Hourly | NI Number | Holiday Allo | Holiday Allo | Holiday Hou |
|-------|------------|------------|-------------|--------------|--------------|-----------|--------------|--------------|-------------|
| Mrs. | Virginia | Ackermane | 107345 | Administrato | 0 | PJ634908C | 20 | 3 | |
| Mrs. | Susan | Aitken | 102874 | Production C | 0 | | 20 | | |
| Mrs. | Jayna | Amiani | 104772 | Operator | 0 | | 18 | | |
| Mrs. | Megan | Broadhurst | 102997 | Operator | 0 | | 20 | 0 | |
| Mr. | Michael | Chauvin | 102479 | Electrician | 600 | | 20 | | |
| Mrs. | Theresa | Diamond | 103846 | Supervisor | 0 | | 20 | | |
| Mr. | Gavin | Edwards | 109724 | Clerk | 0 | | 20 | 1 | |

Use the Open File button to browse to the file containing the data you wish to import. When you select a file Focus displays it in the 'CSV to Import' Window. It lists the names of the fields in the data file and allows you to specify which field within Focus to map to. Any names that match in both files will be pre-mapped for you. Complete the mapping by picking the field within Focus that you want to map to from the drop down list box.

When you have finished setting the field mapping, click on 'Import' to read the data file into Focus.

You can use the Import feature to Add bulk data to an existing database. For instance, suppose when your system is installed you import only basic information on your employees, such as Payroll Number, Name and Job Description. Later on you can add, for instance, address details by importing a CSV with this information as well as the pre-existing Payroll Number. When Focus Imports and finds a new record with the same Payroll Number as an existing record it prompts you to merge the new record with the existing one or to replace the existing record completely.

9.9 Backup/Restore

System menu - Backup/Restore



Shortcut Button

The Backup button will prompt you for the name of a File where you would like to save the current database.

Likewise the Restore button will prompt you for the name of a File from which to restore the database. The Restore function will replace the current database and as such, should be used with extreme caution. The Restore will always prompt you to make sure you have a backup of the current database.

Access rights to Backup and Restore may be individually enabled via the User Password system.

10 Overtime Working and Authorisation

FOCUS provides a comprehensive set of tools for monitoring and controlling the use of overtime in the work environment.

Firstly, FOCUS gives you an unlimited number of Daily Rules allowing you to set up conditions when overtime will be accrued. This can be pre-shift and post shift overtime (after a minimum has been met) or after an amount of hours have been worked at basic rate. Weekly Rules can also be set to modify hours accrued to overtime if, for instance, insufficient Basic Rate hours have been worked for the week. Combining these rules allows you to separate hours worked at Basic and up to 5 rates of Overtime.

For different groups of personnel, you can allow FOCUS to pay the hours automatically, or not pay the hours and inform the Supervisor. You would do this by reserving one of the 6 Pay Rates as 'Unauthorised Overtime' and have the Daily Rule accrue Unauthorised Overtime at this Rate. In the example below, Overtime-1 has been set to accrue hours worked before or after the shift into Rate 4:

WKS2 08:00 to 17:00

Short Code

Name

Start Time

End Time

WKS2

WKS2 08:00 to 17:00

08:00

17:00

Rate Bands

| From | To | Rate | Min |
|-------|-------|------|-------|
| 00:00 | 08:00 | 4 | 01:00 |
| 08:00 | 17:00 | 1 | 00:00 |
| 17:00 | 19:00 | 4 | 00:30 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |
| 00:00 | 00:00 | 0 | 00:00 |

The Exceptions within the Daily Rule have been set to notify if any hours are worked at Rate 4. Note that this screen can also be used to flag when the employee works less than the expected number of hours at any rate (in this case 8 hours at Basic).

WKS2 08:00 to 17:00

Short Code

Name

Start Time

End Time

WKS2

WKS2 08:00 to 17:00

08:00

17:00

Create exceptions for these events

Targets

| | Condition | Time | Rate |
|--|-----------|-------|------|
| <input checked="" type="checkbox"/> Target Hours 1 | More Than | 00:00 | 4 |
| <input checked="" type="checkbox"/> Target Hours 2 | Less Than | 08:00 | 1 |
| <input type="checkbox"/> Target Hours 3 | Less Than | 00:00 | Any |
| <input type="checkbox"/> Target Hours 4 | Less Than | 00:00 | Any |

A typical time sheet might look like the one below. Here, Unauthorised Overtime has been worked 3 days and calculated into the Rate 4 column by the settings on the Daily Rule.

| 103846 Theresa Diamond (Schedule: Works 3 Shift System, Weekly Rule: Works) | | | | | | | | | | | |
|---|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| Date | In | Out | In | Out | BASIC | O/T 1 | O/T 2 | O/T U | SICK | HOL | Shift |
| | | | | | x01.00 | x01.25 | x01.33 | x00.00 | x01.00 | x01.00 | |
| Mon 23 Jan | 07:56 | 12:34 | 13:00 | 16:59 | 08:30 | | | | | | WKS2 |
| Tue 24 Jan | 07:54 | 12:26 | 13:01 | 19:05 | 08:29 | | | 02:00 | | | WKS2 |
| Wed 25 Jan | 07:50 | 12:32 | 12:59 | 19:36 | 08:30 | | | 02:00 | | | WKS2 |
| Thu 26 Jan | 07:59 | 12:33 | 12:55 | 19:45 | 08:30 | | | 02:00 | | | WKS2 |
| Fri 27 Jan | 07:57 | 12:29 | 13:03 | 16:59 | 08:27 | | | | | | WKS2 |
| Sat 28 Jan | | | | | | | | | | | |
| Sun 29 Jan | | | | | | | | | | | |
| Weekly Hours | 48:26 | | | | 42:26 | | | 06:00 | | | |
| Weekly Rules Applied | 48:26 | | | | 42:30 | | | 05:56 | | | |
| Weekly Gross Totals | 42:50 | | | | 42:50 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | |

When the Supervisor clicks on Exceptions, any Unauthorised Overtime will be indicated in the list on the left of the screen:



The Supervisor has 2 choices how to deal with the Unauthorised Overtime occurrences. He/she can either drill down the list to each employee's individual timesheet, or can carry out a 'Bulk Authorise'. The latter would be typically used where a group of employees had been asked to work extra time for a number of days.

Single Authorisation:

Clicking on the occurrence in the list of Exceptions brings up the Employee's timesheet containing the Exception, and clicking on the 2 hours in Rate 4 pops up the Authorisation screen:

Now, the Supervisor can Authorise part or all of the Overtime by electing to move hours from the Rate 4 column to any other column and if desired can add a Reason and/or a Comment.

The Timesheet below shows the results of Authorising both hours worked on the Tuesday and only one hour worked on Wednesday. Thursday remains to be dealt with and will still be registering in the Exception List for this Supervisor. Authorising none of the Overtime results in the Exception being removed (dealt with) but no Overtime paid.

| 103846 Theresa Diamond (Schedule: Works 3 Shift System, Weekly Rule: Works) | | | | | | | | | | | |
|---|---------------------|-------|-------|-------|--------|--------|--------|--------|--------|--------|-------|
| Date | In | Out | In | Out | BASIC | O/T 1 | O/T 2 | O/T U | SICK | HOL | Shift |
| | | | | | x01.00 | x01.25 | x01.33 | x00.00 | x01.00 | x01.00 | |
| Mon 23 Jan | 07:56 | 12:34 | 13:00 | 16:59 | 08:30 | | | | | | WKS2 |
| Tue 24 Jan | 07:54 | 12:26 | 13:01 | 19:05 | 08:29 | 02:00 | | 00:00 | | | WKS2 |
| | Authorised Overtime | | | | | | | | | | |
| Wed 25 Jan | 07:50 | 12:32 | 12:59 | 19:36 | 08:30 | 01:00 | | 01:00 | | | WKS2 |
| | Authorised Overtime | | | | | | | | | | |
| Thu 26 Jan | 07:59 | 12:33 | 12:55 | 19:45 | 08:30 | | | 02:00 | | | WKS2 |
| Fri 27 Jan | 07:57 | 12:29 | 13:03 | 16:59 | 08:27 | | | | | | WKS2 |
| Sat 28 Jan | | | | | | | | | | | |
| Sun 29 Jan | | | | | | | | | | | |
| Weekly Hours | 48:26 | | | | 42:26 | 03:00 | | 03:00 | | | |
| Weekly Rules Applied | 48:26 | | | | 42:30 | 03:00 | | 02:56 | | | |
| Weekly Gross Totals | 46:25 | | | | 42:50 | 3.75 | 0.00 | 0.00 | 0.00 | 0.00 | |

All transactions are recorded in the Audit Log;

| Number | Last Name | Change | Detail |
|--------|-----------|---|---------------------|
| 103846 | Diamond | Authorise Overtime 25/01/2006 02:00 Rate 4, 01:00 moved to Rate 2 | Authorised Overtime |
| 103846 | Diamond | Authorise Overtime 24/01/2006 02:00 Rate 4, 02:00 moved to Rate 2 | Authorised Overtime |

Bulk Authorisation:

Right clicking in the Exceptions List and then clicking 'Authorise' directs the Supervisor to the Bulk Authorisation screen:

Report Period

Start Date: End Date: 7 Days

Groups

Works

| Number | First Name | Last Name | Date | Rate | Hours | Rule | Rule Start | Rule End | Clock In | Clock Out |
|--------|------------|-----------|------------|------|-------|------|------------|----------|----------|-----------|
| 108489 | Martha | Hackett | 27/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 103846 | Theresa | Diamond | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:45 |
| 105398 | Kathryn | Warthing | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 105398 | Kathryn | Warthing | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 105398 | Kathryn | Warthing | 24/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 107873 | Anthony | Melcher | 25/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 107873 | Anthony | Melcher | 24/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 108347 | Eva | Gillespie | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:15 |
| 108347 | Eva | Gillespie | 23/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 20:00 |
| 105498 | Karen | Yates | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:15 |
| 105498 | Karen | Yates | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 105498 | Karen | Yates | 25/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 105498 | Karen | Yates | 23/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |

Authorise...

This shows the employees in the Supervisor's Group who have worked Unauthorised Overtime, along with the Shift Start and End times and their actual Clocking Times. This assists the Supervisor to decide which hours to Authorise. The Supervisor can Authorise All employees, or pick out individuals from the list by clicking on them. In the example case, 3 Employees are highlighted and clicking on the Authorise button pops up the Authorise screen. Again, part or all of the hours worked can be authorised.

Report Period

Start Date: End Date: 7 Days

Groups

Works

| Number | First Name | Last Name | Date | Rate | Hours | Rule | Rule Start | Rule End | Clock In | Clock Out |
|--------|------------|-----------|------------|------|-------|------|------------|----------|----------|-----------|
| 108489 | Martha | Hackett | 27/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 103846 | Theresa | Diamond | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:45 |
| 105398 | Kathryn | Warthing | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 105398 | Kathryn | Warthing | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 105398 | Kathryn | Warthing | 24/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 107873 | Anthony | Melcher | 25/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 107873 | Anthony | Melcher | 24/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:00 |
| 108347 | Eva | Gillespie | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:15 |
| 108347 | Eva | Gillespie | 23/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 20:00 |
| 105498 | Karen | Yates | 27/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:15 |
| 105498 | Karen | Yates | 26/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |
| 105498 | Karen | Yates | 25/01/2006 | 4 | 01:45 | WKS2 | 08:00 | 17:00 | 08:00 | 18:45 |
| 105498 | Karen | Yates | 23/01/2006 | 4 | 02:00 | WKS2 | 08:00 | 17:00 | 08:00 | 19:30 |

Authorise...

Authorise

Authorise 3 Exceptions

Amount To Authorise: To Rate:

Reason:

Comment:

Save Cancel Edit

In summary, FOCUS provides you with the tools to:

- Define which working patterns constitute Overtime;

- Decide what Overtime can be paid without intervention;
- Flag up to the Supervisor those events which need his/her attention;
- Provide the information the Supervisor needs to make decisions;
- Allow the rapid implementation of those decisions;
- Document the outcome for the Employee;
- Record the process for revue or Audit.

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